

# **eDoc Lite Recruitment Guidelines**

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## ***Introduction***

In an effort to streamline and create an easier way to process the submission of recruitment forms, the Office of Affirmative action in conjunction with the Dean of the Faculties office have created a group of electronic documents for use by IU departments. The eDocs will allow departments to present their information in an easy to use and thorough fashion that will then be electronically routed onto the School / RC, the Office of Affirmative Action, and the Dean of the Faculties office for review and approval. The files are stored electronically to help reduce the number of paper forms being used and allows for retrieval for reference at any time. The following document details the various tools and components that make up this system.

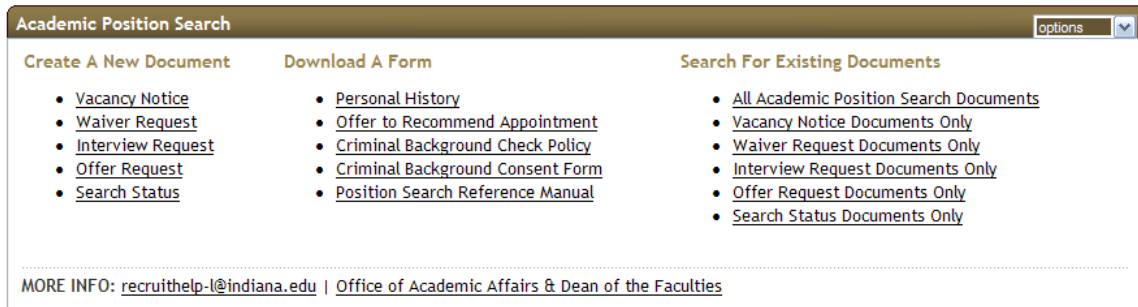
## ***OneStart & the Academic Position Search Channel***

Access to the Online Recruitment eDocs will be limited by group access. Only users added to the security group will see the Academic Position Search channel within OneStart.

To access the channel:

1. Open OneStart
2. Click on the tan Services Tab located along the top
3. Click on the Administrative Services Section located along the left
4. Click on the Academic subsection located along the left

The channel will now be in the main body of the portal and contains the necessary links needed to create the different types of eDocs as well as links to useful forms and Recruitment Specific search options.



The screenshot shows a web interface titled "Academic Position Search" with a dropdown menu for "options". The interface is organized into three columns:

- Create A New Document**
  - [Vacancy Notice](#)
  - [Waiver Request](#)
  - [Interview Request](#)
  - [Offer Request](#)
  - [Search Status](#)
- Download A Form**
  - [Personal History](#)
  - [Offer to Recommend Appointment](#)
  - [Criminal Background Check Policy](#)
  - [Criminal Background Consent Form](#)
  - [Position Search Reference Manual](#)
- Search For Existing Documents**
  - [All Academic Position Search Documents](#)
  - [Vacancy Notice Documents Only](#)
  - [Waiver Request Documents Only](#)
  - [Interview Request Documents Only](#)
  - [Offer Request Documents Only](#)
  - [Search Status Documents Only](#)

At the bottom, there is a "MORE INFO:" section with the email [recruithelp-l@indiana.edu](mailto:recruithelp-l@indiana.edu) and the text "Office of Academic Affairs & Dean of the Faculties".

## ***eDoc Lite Documents and Routing***

eDoc Lite documents are electronic forms with logic built into them to assist the user in completion and to then route the document along a defined path for approval. These documents are customized for each application of use. The following pages have descriptions of each document as well as notes for their use as it applies to the Office of Affirmative Action and their recruitment forms.

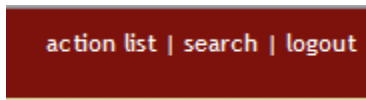
The eDoc Lite documents mirror the current paper process that is in place. A few fields have been added to some of the documents to aid in routing and for consistency sake and a new document has been created to better define the conclusion of a search. For all documents required fields will be noted with a red asterisk (\*); users will not be able to route the document onto the next approver if these fields are not completed.

### *Routing*

To expedite the review process of these documents, we've implemented a university workflow engine to electronically route the documents for review. All documents follow the same path: Initiator → School / RC → Office of Affirmative Action → Dean of the Faculties. After the documents have been final approved by the Dean of the Faculties Department, an acknowledgement will be sent back to the initiator and School / RC level to let them know the document has completed its travel.

### *Action List*

During the life of the eDoc there are two different ways that it can be accessed. When it's being routed for approval or acknowledgement, the approver or acknowledger will need to access the document from their Action List. The Action List contains all the docs across the various university systems that use Workflow. Users of HRMS eDocs, Purchasing, and other systems will be familiar with its use. Your action list can be accessed in a variety of different ways, but the most common and convenient way is to use the Action List link that is located at the top right of the OneStart Portal.



From the action list you'll be provided with information about the type of document, the action being requested of you (Approve or Acknowledge), who created the document, and when it was created. Clicking On the Document ID will open the document so that you may take action on it.

### *Route Controls*

All of our specialized documents contain the same route control buttons for the initiator, the person creating the document from scratch. "Route" will move the document on to

the first route level approver at the School / RC level. “Save” will save the document to the initiators Action List; from there they can open the document and “Route” or “Cancel” it. “Cancel” terminates the current document and deletes it from being created.

For Approvers, the “Route” and “Cancel” buttons are replaced with “Approve” and “Disapprove”. Approving the document will route it onto the next approver at that level or onto the next level. Disapproving the document will finalize it as Disapproved and send Acknowledgements to anyone that has approved the document up to that point.

### *Workgroups*

At each approval level, workgroups will be used. The workgroup will contain a set of approvers that will all receive the document for approval. Once one person from the group has approved the document, it will be removed from the action list of the rest of the group.

### *Document Search*

When the document is no longer in your action list or after it has completed its workflow path, the document can be accessed from Document search. Again, users of other workflow related systems will be familiar with document search. However, for the Recruitment documents we’ve added additional functionality to increase the usefulness of document search. As such it’s recommended that users use the document search link provided in the Academic Position Search channel. Using the link will provide the user with two additional fields to search on; the OAA number and the Department specified on the document. This will help narrow down the search results set and aid in finding the right document. Once you’ve found the document you want, clicking on the Document ID will open the document. Through document search, the document can only be viewed; no changes, deletions, or additions are allowed.

## ***eDoc Lite Documents***

The next few pages detail the intended use, and any important items of information related to the eDoc Lite Documents.

## Vacancy Notice

- The Vacancy Notice document is to be filled out by the department who is initiating a search for a vacant position.
- The first field on the document is an OAA number; this is not a required field and will be entered when the document reaches the Office of Affirmative Action for approval.
- A separate section towards the bottom is presented for Utilization data. This section is to be completed only by the OAA group. After they have entered the information, this data will be available for viewing using the document search option to view the document.
- **NEW (4/15/2008)** A new field is now provided for instances where a prior search is being continued. The field, “Reactivating Prior Year Search: OAA#”, is used for linking this new search to the prior one by providing the prior OAA #.

<b>Vacancy Notice</b>		OAA :	<input type="text"/>
Indiana University - Bloomington Academic Positions		School / RC :	COAS <input type="button" value="v"/>
Attributes marked with a * are required fields.			
Department* :	<input type="text"/>	FTE* :	<input type="text"/>
Title(s)* :	<input type="text"/>		
Position* :	<input checked="" type="radio"/> New <input type="radio"/> Replacement	Account/Position #, Individual, or Specialized Area* :	<input type="text"/>
Salary Grade* :	<input type="text"/>	Salary Range* :	<input type="text"/>
Part Time Position :	<input type="checkbox"/> Part Time Position	Visiting Position : (temporary = 2 years or less)	<input type="checkbox"/> Visiting Position
Expected Start Date* :	<input type="text"/>	Expected End Date :	<input type="text"/>
Search Scope :	<input type="text" value="All"/>	National Publications :	<input type="text"/>
National Direct Mail :	<input type="text"/>	Targeted Publications :	<input type="text"/>
Personal Contacts :	<input type="text"/>	Electronic :	<input type="text"/>
Other :	<input type="text"/>		
Comments :	<input type="text"/>		
Search Committee Chair :	<input type="text"/>		
Search Committee Member 1 :	<input type="text"/>	Search Committee Member 2 :	<input type="text"/>
Search Committee Member 3 :	<input type="text"/>	Search Committee Member 4 :	<input type="text"/>
Text of Vacancy Announcement :	<input type="text"/>		

## Interview Request

- The Interview Request document is to be filled out by the department initiating the search and is used to declare persons to be interviewed.
- If more than 8 Candidates are to be interviewed, an additional Interview Request should be created.
- The OAA number used is the same as the one provided by the Office Affirmative Action for the corresponding Vacancy Notice.
- A separate section towards the bottom is presented for Applicant Pool data. This section is to be completed only by the OAA group. After they have entered the information, this data will be available for viewing using the document search option to view the document.

Interview Request		OAA* :	<input type="text"/>			
Indiana University - Bloomington Academic Positions		School / RC :	COAS <input type="button" value="v"/>			
Attributes marked with a * are required fields.						
Department* :	<input type="text"/>					
Title* :	<input type="text"/>	Salary Grade* :	<input type="text"/>			
Acct./Position#* :	<input type="text"/>					
List of top-ranked candidates with an indication of those to be interviewed: All candidates being considered for positions of Associate of Full Professor must be interviewed by a representative of the Office of the Vice Chancellor for Academic Affairs and Dean of Faculties. (See Academic Guide, B-3)						
Name	Application Date	Request Interview	Sex* Ethnicity*			
*entered by the Office Of Affirmative Action						
1: <input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/> <input type="text"/>			
2: <input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/> <input type="text"/>			
3: <input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/> <input type="text"/>			
4: <input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/> <input type="text"/>			
5: <input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/> <input type="text"/>			
6: <input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/> <input type="text"/>			
7: <input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/> <input type="text"/>			
8: <input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text"/> <input type="text"/>			
Total Applicants	<input type="text"/>	(Entered by the interviewing department):				
Total AMFs Received	<input type="text"/>					
Comments	<input type="text"/>					
The following section to be filled in by the Office of Affirmative Action.						
	<b>White</b>	<b>Black</b>	<b>Hispanic</b>	<b>Asian</b>	<b>Native American</b>	<b>Hawaiian Pacific Islands</b>
<b>Male</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Female</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Sex Not Given</b>	<input type="text"/>					

## Offer Request

- The Offer Request is to be filled out by the department initiating the search and is used to document a potential offer to the candidate.
- The OAA number used is the same as the one for the corresponding Vacancy Notice.
- Links to a template for the Offer to Recommend Appointment letter are provided. To download a copy of the preferred formatted template:
  1. Right Click on the preferred formatted template link
  2. Select Save Target As from the menu
  3. Select an appropriate place on your computer to save a copy of the template.
  4. Click the Save button
- After you've downloaded and modified the template, you need to attach it to the document for review at the approval levels. Multiple versions of the letter can be created and attached to this document. Then attach the letter(s):
  1. Click on the Browse... button in the Create a Note section towards the bottom of the document.
  2. Use the new window to search for the document you want to attach.
  3. Highlight it by clicking on the document title and then click the OK button
  4. Finally add any notes you'd like in the free form note section and click the Save button (under the Action column title) to add the note and attach the letter to the eDoc Lite document.

Offer Request		OAA* :	<input type="text"/>
Indiana University - Bloomington Academic Positions		School / RC :	COAS <input type="button" value="v"/>
<p>"Offer to Recommend Appointment" form and a draft of the Dean's offer letter must be included with this request. If a candidate declines an offer a new form must be submitted recommending that an offer be extended to another candidate.</p> <p>Attributes marked with a * are required fields.</p>			
Department* :	<input type="text"/>	FTE* :	<input type="text"/>
Title(s)* :	<input type="text"/>		
Salary Grade* :	<input type="text"/>	Acct./Position#* :	<input type="text"/>
Proposed Salary Base* :	<input type="text"/>	Expected Start Date* :	<input type="text"/>
Expected End Date :	<input type="text"/>		
Recommending Offer To* :	<input type="text"/>		
Sex :	<input type="text"/>	Ethnicity :	<input type="text"/>
Citizenship :	<input type="text"/>		
Additional Comments :	<input type="text"/>		
<p>Please download and attach an Offer to Recommend Appointment template letter from the links below. After filling out the form, attach the completed document to this eDoc prior to routing.</p> <p><a href="#">PDF format</a> <a href="#">MicroSoft WORD format</a></p>			
Set annotation:			
<input type="text"/>			
<input type="button" value="route"/> <input type="button" value="blanketApprove"/> <input type="button" value="save"/> <input type="button" value="cancel"/>			
Create Note			
Author	Date	Note	Action
Matt A Sargent	01/23/2007	<input type="text"/>	<input type="button" value="save"/>

## Search Status

- The Search Status document is new. It's intended to be filled out by the department initiating the search and is used to document the final results of the search.
- The OAA number used is the same as the one for the corresponding Vacancy Notice or Waiver Request.
- **New (04/15/2008)** In the event that the Offer Status is selected as Declined or No Offer was made, a new list of values is provided to outline what the next steps for this search will be.

Search Status		OAA* :	<input type="text"/>
Indiana University - Bloomington Academic Positions		School / RC :	COAS ▾
Attributes marked with a * are required fields.			
Department* :	<input type="text"/>		
Position Title* :	<input type="text"/>		
Salary Grade* :	<input type="text"/>	Acct./Position#* :	<input type="text"/>
Offer made to :	<input type="text"/>		
Offer was :	Offer Status	▾	
	Expected Start Date	<input type="text"/>	
	Status of Search	▾	
	Description for "Other"	<input type="text"/>	
Comments :	<input type="text"/>		
Set annotation:			
<input type="text"/>			
<input type="button" value="route"/> <input type="button" value="blanketApprove"/> <input type="button" value="save"/> <input type="button" value="cancel"/>			
Create Note			
Author	Date	Note	Action
Matt A Sargent	01/23/2007	<input type="text"/>	<input type="button" value="save"/>
		Attachment: <input type="text"/> <input type="button" value="Browse..."/>	

## Waiver Request

- The Waiver Request document is similar to the Vacancy Notice in that it is completed by the department initiating the search, but in this case the department is also requesting a waiver from the normal academic search requirements.
- The first field on the document is an OAA number; this is not a required field and will be entered when the document reaches the Office of Affirmative Action for approval.
- Links to a template for the Offer to Recommend Appointment letter are provided. To download a copy of the preferred formatted template:
  1. Right Click on the preferred formatted template link
  2. Select Save Target As from the menu
  3. Select an appropriate place on your computer to save a copy of the template.
  4. Click the Save button
- After you've downloaded and modified the template, you need to attach it to the document for review at the approval levels. Multiple versions of the letter can be created and attached to this document. Then attach the letter(s):
  1. Click on the Browse... button in the Create a Note section towards the bottom of the document.
  2. Use the new window to search for the document you want to attach.
  3. Highlight it by clicking on the document title and then click the OK button
  4. Finally add any notes you'd like in the free form note section and click the Save button (under the Action column title) to add the note and attach the letter to the eDoc Lite document.

<b>Waiver Request</b>		OAA :	<input type="text"/>
Indiana University - Bloomington Academic Positions		School / RC :	COAS <input type="button" value="v"/>
Attributes marked with a * are required fields.			
Department* :	<input type="text"/>	FTE* :	<input type="text"/>
Title(s)* :	<input type="text"/>	Salary Grade* :	<input type="text"/>
Recommending Offer To* :	<input type="text"/>	Salary* :	<input type="text"/>
Position* :	<input checked="" type="radio"/> New Position <input type="radio"/> Replacement For	Account/Position #, Individual, or Specialized Area :	<input type="text"/>
Expected Start Date* :	<input type="text"/>	Expected End Date :	<input type="text"/>
Waiver Circumstances :	Endowed Chair <input type="button" value="v"/>		
Detailed Explanation :	<input type="text"/>		
Sex :	<input type="text"/>	Ethnicity :	<input type="text"/>
Citizenship :	<input type="text"/>		
Comments :	<input type="text"/>		
Set annotation:			
<input type="text"/>			
<input type="button" value="route"/> <input type="button" value="blanketApprove"/> <input type="button" value="save"/> <input type="button" value="cancel"/>			
<b>Create Note</b>			
Author	Date	Note	Action
Matt A Sargent	01/23/2007	<input type="text"/>	<input type="button" value="save"/>
Attachment:		<input type="text"/>	<input type="button" value="Browse..."/>

## ***Support***

If at any time you have questions associated to their intended use, the functionality contained within, or the routing associated with the OAA Recruitment documents, please send an email to [recruithelp-1@indiana.edu](mailto:recruithelp-1@indiana.edu).