Academic Personnel Services

Tenure-track and Temporary Position Faculty Applicant Processing Guide

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Part I. Tenure-track and Temporary Faculty Position (not part-time pool) Application Management Process

Applicants to academic year 2008/09 faculty tenure-track or temporary positions <u>will not</u> be entered into PeopleSoft. However, we still need to track these applicants for reporting purposes as in past semesters. Because of this, we have developed a process for departments to create Excel spreadsheets to track applicants (rather than through PeopleSoft).

1) As applications are received for your tenure-track or temporary faculty position, enter applicant information in the Applicant spreadsheet template **(ApplicantSS.xls)**. You will be using this spreadsheet to create email acknowledgements for the applicants to confirm receipt of their application as well as to provide them with web links for the **Applicant Statement** and the **Confidential Applicant Data Form**.

   The spreadsheet template has been set up with the following fields:

AppDate	**Required Field**	Date application was received
LastName	**Required Field**	Applicant last name
FirstName	**Required Field**	Applicant first name
Prefix	**Required Field**	Name prefix (i.e., Dr., Ms., or Mr.)
Job#	**Required Field**	Job number for your recruitment
Department	**Required Field**	Your department name
EmailDate	**Required Field**	Date you sent email to applicant acknowledging receipt of application. You will leave this field blank until after you have sent your email.
AppComplete	**Required Field**	Indicate whether the application is complete (i.e., yes or no)
MinQuals	**Required Field**	Indicate whether the applicant meets the minimum qualifications for the position (i.e., yes or no). You will leave this field blank until after applications have been screened.
Email	**Required Field**	Applicant's email address
MissingStatement	**Optional Field**	If you would like to let applicants with incomplete applications know which documents are missing, you can use this field in conjunction with the **MissingItems** field. Using this field you can insert a sentence like "The following items are missing from your application package and should be supplied to our Department as soon as possible for full consideration of your application:" to your email acknowledgement letter.
MissingItems	**Optional Field**	If you choose to let applicants with incomplete applications know which documents are missing, list missing items here (separated by a comma and ending with a period) (e.g., 2 Reference Letters, Transcript copies.) This field is set up to be

		used in conjunction with the **MissingStatement** field.

2) Update the email message template (**Ten_App_Ack_Email.doc** for tenure-track or **Temp_Posn_App_Email.doc** for temporary positions) with your Department information (your name, department, contact information, etc.), then create your email acknowledgements using the mail merge process described in Part III of this guide.

3) Update your spreadsheet with the date the email was sent to this group of applicants.

4) With our process this semester, <u>you will need to track which applicants you have sent acknowledgements so that you do not send acknowledgement emails to the same applicants more than once</u>. As you may recall, when we were using PeopleSoft and our previous letter acknowledgement process, the system tracked which applicants were new entries (versus ones that you had already pulled into spreadsheets to send acknowledgements). Excel does not have this same capability, so you will need to manually manage your applicants. Here are a couple of suggestions for how to keep track of which applicants have already received emails:

    a. Option 1: When you are doing your mail merge, use the “Edit recipient list…” option on Screen 3 of the mail merge windows to select only those applicants you have not already emailed (Check those you want to include in the current batch, uncheck those that have already been emailed). You can use the email date field to figure out which applicants have received an acknowledgement email.

    b. Option 2: Use the cut and paste features to move applicants to whom you have already sent email acknowledgements from the first sheet of the Excel workbook to the second sheet of the workbook. In our template, we have set up the sheets for this option. The tabs at the lower left of the workbook are titled “Unsent” and “Sent” to help you manage your applicants using this option.

5) Use your applicant spreadsheet to create the Form 2 Applicant Log for your department. Your Form 2 should be routed for signatures after the close date/application deadline for your vacancy.

6) Send an electronic copy of your applicant spreadsheet to Academic Personnel Services (aps@humboldt.edu). Since we do not have the central PeopleSoft system for storing applicant information for this year, our department will serve as the central repository for applicant information.

Part II. Questions and Answers about the Faculty Applicant Management Process

1) Do I really have to do this?

We are required to maintain records of all applicants to positions on campus in order to comply with our Equal Employment Opportunity policies. The information received from the Confidential Data Form is also used to fulfill our Affirmative Action reporting requirements. Therefore, yes, you are required to maintain a spreadsheet of your department applicants, send them an acknowledgement that contains the Confidential Applicant Data Form and Applicant Statement links, and send an electronic copy of your spreadsheet to Academic Personnel Services for our records.

2) I'm having problems getting email merge to work. What can I do?

For those of you using Microsoft Outlook, the email merge process should work automatically. For other users, some manipulation may be needed. Please contact your ITC for help with setting up your computer to allow email merge if you are having problems. Alternatively, you can do a merge to **letters** (instead of **emails**) and when your merge is complete, copy and paste the text of each page into a separate email. (See Question #5 below.)

3) How do I know the merge process worked and email messages were created?

You can change your email settings in your email program (e.g., Outlook or Eudora) to confirm that your email messages are going to your applicants. By changing these settings, your messages will wait in your Outbox until you click Send/Receive to send the messages. You can view the messages in your Outbox, add a cc to yourself, or modify messages, if needed.

The process: In Microsoft Outlook, go to **Tools**, then **Options**, then click on the **Mail Setup** tab at the top of the open window. Uncheck the box marked "**Send immediately when connected**". Click on the **Send/Receive** button. Uncheck the boxes marked "**Schedule a send/receive every __ minutes**" and "**Perform an automatic send/receive when exiting**", then click **Close** and **OK** to close the screens and apply the changes.

Our office uses Outlook so I do not have the exact process to use for this in Eudora, but the settings can be modified in a similar way.

As an alternate option, if you don't want to change these settings, but you would like to know that the process worked, you can add your email address to the spreadsheet and create a merged email for yourself to confirm that the emails were sent. (Sent emails should also appear in your Sent box.)

4) How do I know the applicants received my message?

In your email program, you can request a delivery and a read receipt. If you choose to request a delivery receipt, you will receive a message back letting you know whether the message was delivered successfully to the applicant's email address. If you request a read receipt, a message box will be sent to applicants when they view your email message letting them know that you have requested a read receipt and asking if they would like to send one. Applicants may choose to send a read receipt or not.

The process: In Microsoft Outlook, go to **Tools**, then **Options**, then click on the **Preferences** tab at the top of the open window. Click on the **Email Options** button, then the **Tracking Options** button. In the center of the screen, check the boxes marked **Read Receipt** and **Delivery Receipt**, then click **OK** a few times to close the open screens and apply the change.

Note: *You must change these settings prior to creating your email messages in order for the delivery and/or read receipt request to be attached to your email messages. (In other words, if the email messages are already waiting in your Outbox, when you change the settings to request a delivery and/or read receipt, the request will not be attached to the email messages.)*

5) I would like a copy of the email messages I sent for my applicant files, but it's a lot of work to print each individual email message. Is there a better way to do this?

Using the same steps as for an email merge, you can do a letter merge either before or after you send out your email acknowledgements. This allows you to print all of your acknowledgement letters at one time.

The process: On the mail merge menu (shows up as a column on the right part of your screen), you can use the **Previous** and **Next** step options at the bottom of the screen to easily move between steps in the mail merge process. Click **Previous** a few times to get back to the first step, then under **Select document type**, click **Letters**. Continue the steps in the mail merge process as described below.

Note: *If you have already created your email messages, all the settings are saved, so you can just click on* ***Next*** *until you reach the last mail merge screen.*

6) I would like to modify the templates for the email and spreadsheet. Is that okay?

Yes, it is fine to modify our email and spreadsheets to fit your department needs. Please note, however, that your email message must include links to the **Applicant Statement** (with your contact information so that the applicant can return the statement to you via fax or US mail) and to the **Confidential Applicant Data Form**. You must also include the paragraph describing the use of the Confidential Data From. Your spreadsheet must include the following data: **Application date, Candidate name, Job#, Department, Date Email was sent, whether the application was complete, whether the applicant meets minimum qualifications for the position, and Email address**.

Part III. Email Mail-merge Process Guide (for Microsoft Word 2007) for use with an email client (e.g. Outlook, Mac Mail) Note: this process cannot be used with the web-version of Zimbra

Open up the *Tenure-Track Applicant Acknowledgement Sample Email* template on the APS web site – Department Staff Resources page: http://www.humboldt.edu/~aps/docs/Ten_App_Ack_Email.doc

1. Click the **Mailings** tab, click **Start Mail Merge**, and then click **Step by Step Mail Merge Wizard**.
2. A box will pop up on the right side of the screen, click **E-mail messages**.
3. Click **Next: Starting document** (at the bottom of the box).
4. Click **Use the current document**.
5. Click **Next: Select recipients.**
   (This is where you identify your Excel applicant spreadsheet for merging into your email message.)
   a. Under **Select recipients**, click **Use an existing list**.
   b. Click **Browse**.
   c. In the **Select Data Source** dialog box, locate and click the data source you want.
      By default, Microsoft Word opens the **My Data Sources** folder. *Instead, go to the folder where your Excel file is saved and select it. Tip: Save the Excel file on your Desktop for easy access.*
   d. Click **Open**.
      Other dialog boxes may appear requesting specific information. If your Microsoft Excel spreadsheet has information on multiple tabs, you need to select the tab containing the information you want, and then click **OK**.
6. Click **Next: Write your e-mail message**.
   a. In the main document, modify the text that you want to appear in every e-mail message. *This is where you customize the "APS" letter for your department – i.e., name, title and contact information of person "signing" the message.*
   b. Insert merge fields where you want to merge names and other information such as the greeting. *For your convenience, the sample email has been set up with merge fields already included to match the sample Excel Spreadsheet.*
      1. In the main document, click where you want to insert the field.
      2. On the **Mailings** tab, click **Insert Merge Field** and select the name of the appropriate field.

After you've completed the main document and inserted all of the merge fields, click the **Microsoft Office button** menu, and then click **Save As**. Name the document, and then click **Save**.

7. Click **Next: Preview your e-mail message**. Preview the items. Do one of the following:
   a. To preview the items in order, click the arrow buttons.
   b. To locate and preview a specific item, click **Find a recipient**, and then enter the search criteria in the **Find Entry** dialog box. *This allows you to personalize a message, or to add information specific to a single recipient.*
8. Click **Next: Complete the merge**.
9. Click **Electronic Mail**.
10. In the **Merge to E-mail** dialog box, finalize the distribution settings.
    a. In the **To** box, verify that the word **Email**, **Email_Address**, or the equivalent is displayed. This ensures that Microsoft Word merges e-mail addresses into the **To** line of your messages, not some other merge field information.
    b. In the **Subject line** box, type the subject line you want to use for all the messages, *e.g. Application Acknowledgement or Receipt of Application, etc.*
11. To complete the merge and send the messages, click **OK**.