

# **eDoc Lite Recruitment Guidelines**

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## Introduction

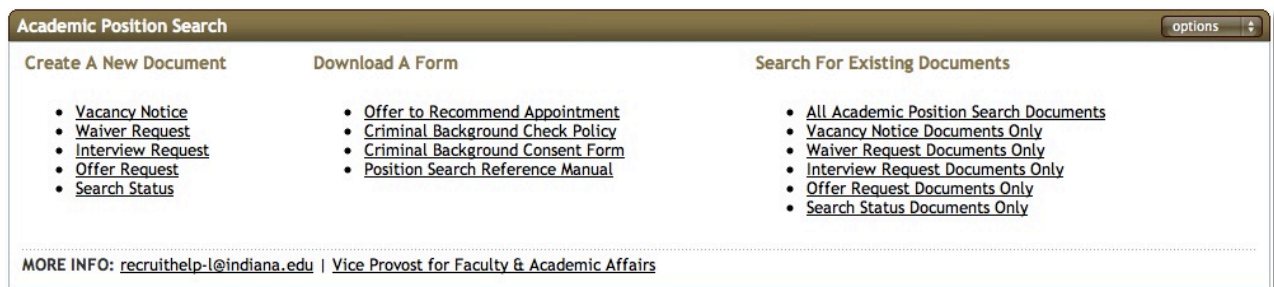
In an effort to streamline and create an easier way to process the submission of recruitment forms, the Office of Affirmative action in conjunction with the Vice Provost for Faculty and Academic Affairs office have created a group of electronic documents. The eDocs will allow departments to present their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

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## OneStart & the Academic Position Search Channel

Access to the Online Recruitment eDocs is limited. Only members of the appropriate ADS 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



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## eDoc Lite Routing and Workgroups

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 Recruitment process.

For all documents, required fields are noted with a red asterisk (\*); initiators 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 use the university's KEW workflow engine to route the documents for review. All documents follow the same path: Initiator to School/RC to OAA to VPFAA

initiator and School/RC approvers to let them know the document has completed its process.

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## 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 KEW. Users of HRMS eDocs, Purchasing, and other university 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 always 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.

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## Routing Controls

All of our specialized documents contain the same route control buttons for the initiator, the person creating the document from scratch. "Submit" will move the document on to the first route level approver at the School/RC level. "Save" will save the document to the your Action List; from there you can open the document and "Submit" or "Cancel", or "Save" it. "Cancel" terminates the current document and deletes it from being created.

For Approvers, the "Submit" 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.

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## Workgroups

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

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## 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 KEW related systems should 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 links will provide you with

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.

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## 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 field provided for instances where a prior search is being continued is provided. The field, "Reactivating Prior Year Search: OAA#", is used for linking this new search to the prior one by providing the prior OAA #.
- 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.

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### 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 when it is routed back for acknowledgement or by using the document search option to view the document.

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### 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.
- A link to a template for the Offer to Recommend Appointment letter is provided. To download a copy of the preferred formatted template:
  - Right Click on the template link and follow the Save As option directions
  - 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):
  - Click on the Browse... button in the Create a Note section towards the bottom of the document and follow the procedures for locating and selecting a file

## Search Status

- The Search Status document is 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.
- 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.

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## Waiver Request

- The Waiver Request document is similar to the Vacancy Notice in that the department initiating the search completes it, 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.
- A link to a template for the Offer to Recommend Appointment letter is provided. To download a copy of the preferred formatted template:
  - Right Click on the template link and follow the Save As option directions
  - 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):
  - Click on the Browse... button in the Create a Note section towards the bottom of the document and follow the procedures for locating and selecting a file.

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## 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-l@indiana.edu](mailto:recruithelp-l@indiana.edu).

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