University of California

Berkeley

ACADEMIC SEARCH DATA COLLECTION SITE

Instruction Manual for the
Office for Faculty Equity
Academic Search Data Collection Site

I. INTRODUCTION

The Academic Search Data Collection Site was created by the Office for Faculty Equity to collect affirmative action data from applicants for academic positions. Federal guidelines require that the University collect this information from all applicants for employment. For compliance purposes, **all units conducting searches for ladder rank faculty must use this site** to gather these data. Units conducting searches for other academic appointments may use this site or may collect the affirmative action data through mail in surveys sent to all candidates.

The Academic Search Data Collection Site automatically sends an email to each candidate acknowledging their application and sending them to a website that will collect the required demographic data. The email message may be customized for each department. The site will automatically generate required affirmative action reporting forms after the search.

II. GETTING STARTED

A. To Obtain Access to the Site

- Users must have an active CalNet identification (https://calnet.berkeley.edu/).
- Forward your full name, employee identification number, email address and department code to the Office for Faculty Equity at admin.ofe@berkeley.edu or (510) 642-1935. You will receive a confirmation email once you have been activated in the system.
- The site can be accessed at https://facultyequity.berkeley.edu/default.asp.

B. Department Administration – Main Menu

After the login is authenticated and you click the **"here"** button to continue, the "Department Administration – Main Menu" screen appears. The options on this screen are described below (Numbers 1-16) in "Before the Search", "During the Search" and "After the Search" sections.

III. USING THE SITE

A. Before the Search

1. Add position

This screen allows you to set up the data collection system for each individual search.

- Enter the following required fields:
  - Position number (up to 8 characters). Faculty searches must be preauthorized by the Executive Vice Chancellor and Provost. Once authorized, each search is assigned a search authorization number, also known as the "position number".
  - Department/division name

- Date the search closes
- Text of the email that will be sent to the applicant
  Each department can choose to use either the default email text, edit the default text or use their own language. The system will automatically append instructions directing the applicant to the survey website regardless of what text is added in this step
- Names and email addresses of the search committee

▪ When you have finished entering the information, click the **"Submit"** button.

2. Edit position

This screen allows you to edit the following information:

- Search Status (may be changed to closed and once closed only website administrator can re-open)
- Department Name
- Position Closure Date
- E-mail Text
- Search Committee Members name and email addresses

▪ Start by highlighting the position number of the position that you would like to edit, and then click the **"Submit"** button.
▪ Edit the information you would like to change or update. When you are done editing the position, click the **"Update"** button on the bottom of the page.
▪ You will be directed to a confirmation page that reads, "The position has been updated." From here you can either edit another position or return to the main menu.

3. View position

By selecting the position number on this screen, you can view the following information:

- Position Number
- Search Status
- Department
- Position Closure Date
- Date Last Modified
- E-Mail Text
- Search Committee Members names and email addresses

▪ Start by highlighting the position number of the position that you would like to edit.

▪ Then click the **"Submit"** button. When you are finished viewing your position, the links at the bottom of the page direct you to either view another position or return to the main menu.

4. Compose/Edit Email

By selecting the position number on this screen, you can edit the email that goes out to applicants as well as edit the closure date and names of search committee members.

5. Verify Email Format by Sending Test Email

This function allows you to send a test email to yourself and see exactly what will be sent to applicants. Because this is only a test, the links in this test email will not work and will not direct you to the survey.

- Start by highlighting the position for which you would like to view the email format for and click the **"Submit"** button.
- Then enter the following information:
  - Last name
  - First name
  - Email address
- Then click the "**Send TEST E-mail**" button. A test email will be sent to the email address you entered.
- After the test email is sent you will receive the confirmation, "Test e-mail has been successfully sent."

6. View Survey Form

This function allows you to see the survey that applicants are asked to complete. Please note, this survey form is meant for viewing purposes only and the "submit" button on the bottom of the page is inactive.

B. During the Search

7. Add Individual Applicant and Send Applicant Email

The names and email addresses of each applicant should be submitted on a rolling basis as applications are received or candidates are identified. Before adding applicant email addresses, please be sure to add the position first (Step 1). This feature will direct you to a page where you can see the following position information as well as add individual applicants to that particular position:

- Position Number
- Department or Division
- Position Status
- Survey Deadline
- Email Text

- Select the position you want to add the applicant to and click the **"Submit"** button.
- Then, enter the last name, first name, email address and click the **"Submit"** button.
- When you click the **"Submit"** button, the system will automatically send an email message along with instructions for completing the survey. After each applicant is added successfully you will get the confirmation message, "Successfully added to database and email has been sent" and you can choose to either add another applicant or return to the main menu.

8. **Upload Excel File** (Add Multiple Applicants)

This step allows you to upload an excel file of applicant names and email addresses. This tool is particularly useful for large searches where many applications come in at once and it is preferable to create and upload an excel spreadsheet rather than enter applicants one by one (Step 7).

- Select the position number you would like to add applicants to and then click the radio button, "Excel file, no headings". Then click on the **"Go to Next Step in Upload Process"** button.
- Next, click on the **"Browse..."** button. The excel sheet must include the position number, last name, first name, email address and be formatted without any headings.
- Find the correct excel file to upload from your computer, then click on the "**Begin Upload and Process Records**" button.
- You will see a confirmation page that either alerts you of errors and asks you to edit your excel sheet and then re-submit it or a confirmation page that tells you that an email has been sent to the applicants from the uploaded file. **Please note**: this is a long page and you must scroll down to see the entire confirmation.

9. **View Upload Statistics**

This link allows you to view a list of all the Applicant Uploads you have attempted/completed and is helpful in determining if your upload was successful. It includes the following information:

- Batch Number
- File Name
- Status
- Uploaded By
- Department
- Position Number
- Bytes
- File Last Modified
- Date Loaded

10. Edit Applicants

This function allows you to edit the names of applicants you have entered. Please Note: Currently the system **only** allows you to edit applicant's name. To request additional corrections to individual records please contact The Office for Faculty Equity at (510) 642-1935 or admin.ofe@berkeley.edu.

- Select the position number and click the **"Submit"** button
- You will be directed to a page that contains the Position Number, Department Name, Position Closure Date and a list of all applicants. Click on the radio button next to the name of the applicant that you would like to edit and click the **"Edit Applicant Name"** button on the bottom of the page.
- Enter the correct name and click the **"Update Applicant Info"** button.
- You will get the confirmation, "The applicant data has been updated" and have the option to either edit another applicant or return to the main menu.

11. Summary of Positions

This link allows you to see the following reports:

- **"Summary of positions. Counts of applicants, responses and referrals"** – The following two links offer different ways to view the same report:
  - **"View/Print, All Positions"** - Allows you to view the summary report as a web page.
  - **"Download to Excel, All Positions" -** Allows you to view the summary report as an excel document.

- **"Position summary. Counts and percents of ethnicity, gender and referrals"** – This report is a good tool for search committees to determine the diversity of an applicant pool. The following three links offer different ways to view the same report:
  - **"View/Print, One Position" -** Allows you to view the report as a web page.
  - **"Download to Excel, One Position" -** Allows you to view the report as an excel document.
  - **"Download to Excel, All Positions"** - Allows you to view a summary report on all positions as an excel document.

C. After the Search

12. Update Search Results

This function allows you to enter an assessment for each applicant, using thequestions below. This information must be entered for each applicant before the Search Report can be generated.

- Was this applicant chosen for an interview?
- What was the reason for this applicant's deselection? (deselection codes below)
- Are there other/multiple reasons for deselection? (enter all that apply)
- Was the job offered to this applicant?
- What was the applicant's response to the job offer?

- Start by first selecting the position number and clicking the **"Continue"** button.
- When you are finished entering assessment data for applicants, you can choose to "save and see next 15" or "save and exit".
- Each time you save by clicking either button on the bottom of the page, you will get the confirmation: "The search results have been updated for position [#]".

13. View Applicants (Create List of BonaFide Applicants)

This feature allows you to view all of the applicants for a given position.

Use this feature to print "List of BonaFide Applicants" by printing the name and email address of each applicant.

- Start by first selecting the position number and clicking the "**Submit**" button.
- The following information is then presented for each applicant:
  - Last Name
  - First Name
  - Email Address
  - Whether the applicant was an interview finalist
  - Reason for de-selection
  - Whether the job was offered to this particular applicant
  - The applicant response to the job offer
  - The date the email was sent
  - The date the applicant responded to the survey
- When you are through reviewing this information, you can either view applicants in another position or return to the main menu.

14. Lookup Deselection Codes

This links provides a list of all the deselection codes and descriptions for the given codes, needed to update search results (Step 13).

15. Download Candidate Demographic Data for Search Reports (Form 2)

This screen allows you to prepare Form 2 for submission, in your preferred format:

- "**View/Print, One Position, Web Report**". Allows you to view the report for one position as a web page.
- "**View/Print, One Position, RTF Report**". Allows you to view the report for one position as a word document.
- "**Download to Excel, One Position**". Allows you to view the report for one position as an excel document.
- "**Download to Excel, All Positions**" Allows you to view the report for all positions as an excel document.

16. Lookup Ethnicity Codes

This link provides a list of all the ethnicity codes and the ethnicity description for the given codes.

If you have any questions, please contact the Office for Faculty Equity via email at admin.ofe@berkeley.edu or by telephone at (510) 642-1935.