

# AppReview Tutorial for Coordinators

(created by Julie Coonrod, 3/28/2014)

AppReview: A program to be used by departments to access applications from the new online graduate application system. Hobsons is the vendor serving the application and the AppReview software. **Currently, AppReview will not function properly using Internet Explorer 8. Hobsons recommends use of Mozilla Firefox or Internet Explorer 9+.**

Coordinator: A person in a department that will create bundles of applications for review. For example, a graduate program advisor (most often staff member) might create bundles based on applicants' research interests. The following tutorial is intended to guide *coordinators*.

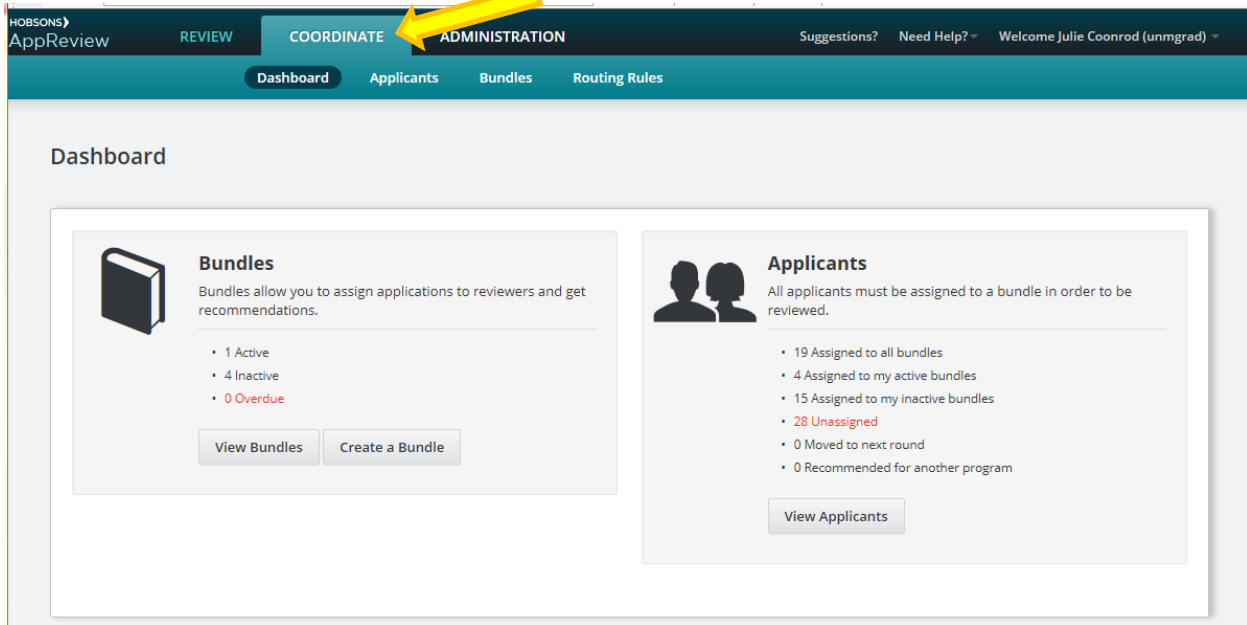
Reviewer: A person (most often faculty member) who will review applications.

1. You are able to access AppReview from MyUNM. Although the system uses your UNM netID, an account must be created for all users. Julie Coonrod <jcoonrod@unm.edu> is currently creating these accounts. Login to AppReview using your netID and password.

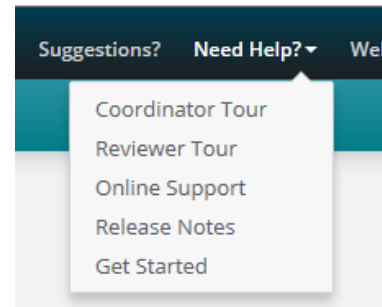
The screenshot shows the myUNM website interface. At the top, there is a navigation bar with the myUNM logo and the text "The University of New Mexico". Below the logo, there is a welcome message for Julie Coonrod. The main navigation menu includes Home, Campus Life, Library, UNM E-Mail, Faculty Life, Employee Life, and Finance. The Employee Life section is currently selected. The main content area is divided into three columns. The left column is titled "Human Resources" and contains links for General Information, Career Development, and Staff Resources. The middle column is titled "LoboWeb For Employees" and contains a message about LoboWeb being unavailable on Saturday. The right column is titled "UNM Business Applications" and contains a list of links under the heading "Transaction and Real-time Query Systems". The link "AppReview GradApp" is circled in red, and a blue arrow points to it from the right. Other links in this section include Internet Native Banner, LoboWeb, LoboAchieve, LoboMart, UNMJobs, and Workflow. Below this, there is a "Reporting" section with links for E-Print, Enterprise Metrics Reporting (EMR), HR Reports, Hyperion, and MyReports. At the bottom, there is a "Banner Resources" section with links for Banner Authorization Requests and Report a Duplicate Person/Non-person.

2. The initial dashboard contains two ribbons at the top. Coordinators will want to click COORDINATE on the top ribbon.

*Top ribbon shows roles available (you may not have all roles available to you.)*



Also note that the Need Help? in the top ribbon will give you access to a quick start guide and a 6 minute video. You may find the Coordinator Tour helpful.



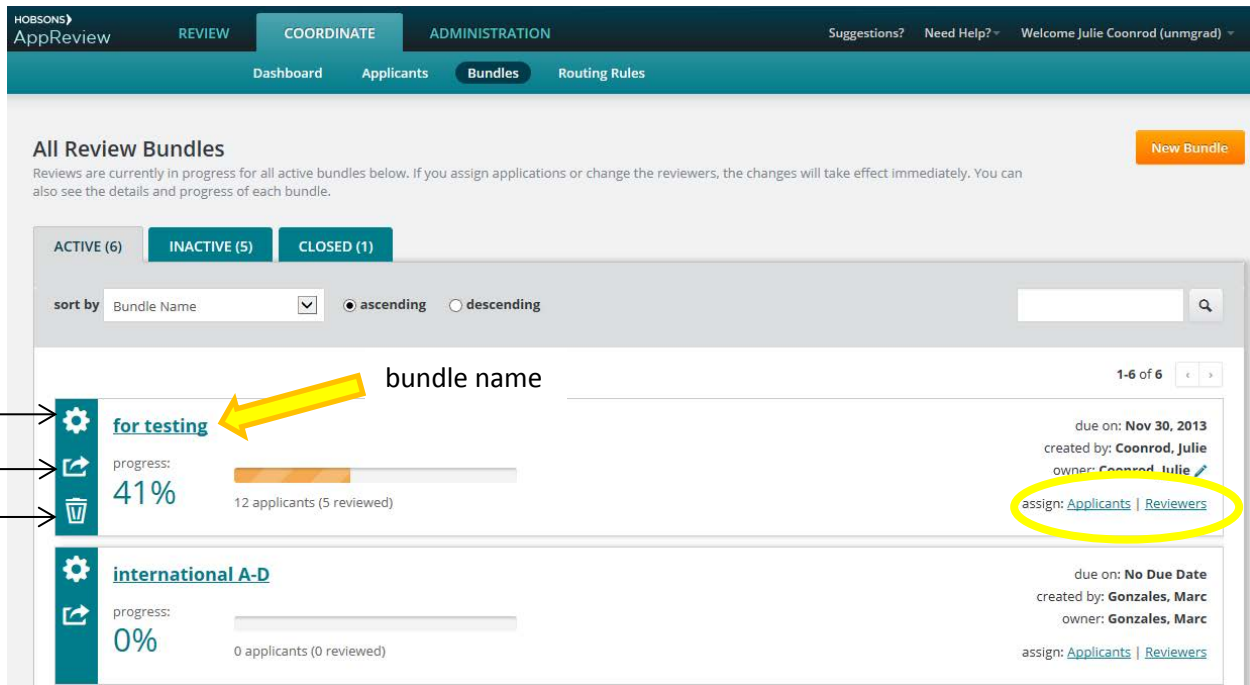
The COORDINATE tab will allow you to choose between the Dashboard, Applicants, Bundles, and Routing Rules. On the Dashboard, the Coordinator will see a summary of bundles on the left and a summary of applicants on the right.

A bundle is simply a group of applications with something in common. For example (as an oversimplification), let's say that Biology has one group of reviewers for applicants interested in 'Plants' and another group of reviewers for applicants interest in 'Animals'. The coordinator for Biology will be able to see all of the applications. They can group, or 'bundle', the two different interests. A bundle must be activated for the reviewers to receive access.

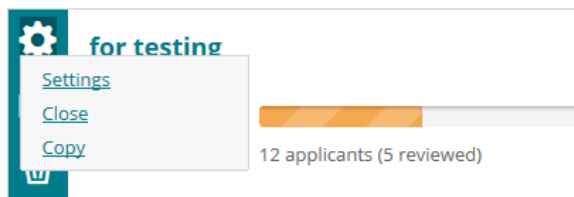
The Applicants shown on the right will be all the applications that have been submitted to the department for which the coordinator has access.

Section 5 will cover Routing Rules so that applicants will automatically be placed in the appropriate bundle based on applicants interests.

3. From the COORDINATE tab, you can select Bundles, taking you to the same screen as if you had selected the View Bundles button from the Dashboard screen. You will see ACTIVE, INACTIVE, and CLOSED bundles. Under the ACTIVE() tab, you will see the bundles that you've created. The number in parentheses will indicate the number of bundles. This number will likely correspond with the number of interests (i.e. 2 bundles for 2 interests, a bundle for applicants interested in 'Plants' and a bundle for applicants interested in 'Animals'.) INACTIVE bundles are ones that you created but did not complete or activate. CLOSED bundles can no longer be accessed by reviewers.



For an active bundle, you may do quite a bit in this interface. In the above screen capture, there is a bundle named 'for testing'. You can see the date the bundle was created and by whom. Also, you can see how many of the applicants have been reviewed. It is simple to add Applicants or Reviewers to an existing bundle. Simply click the links in the bottom right hand corner. The ribbon on the left includes a settings icon that will allow you to change the settings on the bundle, close the bundle, or copy the bundle. Also in this vertical ribbon is an icon to



export a bundle and an icon to trash a bundle (assuming that you're the owner.) If you explore the Bundle Settings, you will see an interface just like you will when you create a new bundle. The next section will deal with this interface.

4. You can create a bundle by clicking the appropriate button on the Dashboard or by clicking the orange New Bundle building on the Bundles page. You will be walked through sequential steps: Settings, Applicants, Reviewers, Customize, Finish. Most items on the SETTINGS page should be self-explanatory. You must name your bundle. When you've completed the page, click Save & Continue.

**Bundle Settings**

Bundles let you assign applicants for review. You'll need to know who the reviewers are and the questions you want to ask them.

**Bundle Name**  
Plants  
Name this something brief and unique.

**Due Date**  
 **On:** 12/11/2013  
Select a date you want to have reviews completed by. Bundle will show as overdue when the date passes if there are applicants still not reviewed.  
 **Don't allow new applicants into this bundle after this date:**  
[Date Input]

**No Due Date**  
Select this option if there is no deadline for reviews to be completed.

**Type of Review**  
 **Private**  
Reviewers will not be able to see each other's reviews or comments.  
 **Public**  
Reviewers will be able to see each other's reviews or comments.

**Review Method**  
 **Parallel**  
Applicants are reviewed by all reviewers at the same time.  
 **Sequential**  
Applicants are reviewed by each reviewer, one after another.

**Review Submission Settings**  
 Head Reviewer can submit Final Recommendation before other reviewers submit their reviews  
 Head Reviewer must answer all required review sheet questions  
 Regular reviewers can submit reviews after Final Recommendation is submitted

Save Save & Continue

You'll then progress to the Applicants part of creating a bundle. You will see a list of all UNASSIGNED APPLICANTS. *This tutorial has been created with dummy applications in the system. Once live, a coordinator should only see applications for their assigned department.* Select the appropriate applications for your bundle. Typically this would be chosen by Interest. In the screenshot, I selected the Interest = Behavioral Ecology for my Plants bundle. You must click Assign and Save. Note the ASSIGNED APPLICANTS tab should now reflect the number of applicants you assigned. After clicking Save & Continue, you'll be able to select the appropriate reviewers for your bundle.

The screenshot shows the 'Assign Applicants to Plants' interface. At the top, there are navigation tabs: 'Dashboard', 'Applicants', 'Bundles', and 'Routing Rules'. Below this is a progress bar with steps: 'Settings', 'APPLICANTS', 'Reviewers', 'Customize', and 'Finish'. The 'APPLICANTS' step is currently active and highlighted in yellow.

The main heading is 'Assign Applicants to Plants' with a 'Save & Continue' button. Below the heading, it says 'Type of Review: Public | Review Method: Parallel' and 'Check off the applicants that should be included and assign them to the bundle.'

There are four tabs for applicant status: 'UNASSIGNED APPLICANTS (19)', 'NEXT ROUND (0)', 'ANOTHER PROGRAM (0)', and 'ASSIGNED APPLICANTS (0)'. The 'UNASSIGNED APPLICANTS (19)' tab is selected.

A search bar and 'View advanced search options.' link are present. Below the search bar, there is a '1 Selected' dropdown and an 'Assign and Save' button, both highlighted in yellow. A '+/-' button and '1-10 of 19' pagination are also visible.

	Last Name	First Name	Last	First	Program	Interest	Term
<input type="checkbox"/>	Hernandez	Javier	Hernandez	Javier	MS Health Education	Community Health Education	Spring
<input type="checkbox"/>	TestDeborah	Kieltyka	TestDeborah	Kieltyka	MA Organization, Information, and Learning Sciences	Organization	Fall
<input type="checkbox"/>	Ryo	Hashimi	Ryo	Hashimi	MARCH Architecture	2-Year Program	Fall
<input type="checkbox"/>	Grotkowshevic	Pia	Grotkowshevic	Pia	MWR Water Resources	Undecided (MWR-WR)	Spring
<input type="checkbox"/>	Gibson	Alisa	Gibson	Alisa	PHD Physics	Undecided (PHD-PHYC)	Fall
<input type="checkbox"/>	Curtis	Ponyboy	Curtis	Ponyboy	MACCT Accounting	Undecided (MACCT)	Fall
<input type="checkbox"/>	Coyote	Wyle	Coyote	Wyle	MS Mechanical Engineering	Undecided (MS-ME)	Spring
<input checked="" type="checkbox"/>	Martin	Cheryl	Martin	Cheryl	PHD Biology	Behavioral Ecology	Fall
<input type="checkbox"/>	Apodaca	Anna Mae	Apodaca	Anna Mae	MS Mechanical Engineering	Undecided (MS-ME)	Spring
<input type="checkbox"/>	Messi	Lionel	Messi	Lionel	MS Physical Education	Sports Administration	Fall

At the bottom, there is a 'Show 10 items per page' dropdown and '1-10 of 19' pagination with navigation arrows.

Select the appropriate reviewers for your bundle by pushing the plus sign next to their name. You should then see them move from the left hand side to the right hand side of the screen. There must be a Head Reviewer for each bundle. Note that you can click the icon to the left of the Assigned Reviewers name to promote that reviewer to Head Reviewer. (In most departments, the Head Reviewer would be the faculty member that serves as Graduate Program Director/Advisor.) Click Save & Continue to progress.

HOBSONS AppReview REVIEW COORDINATE ADMINISTRATION Suggestions? Need Help? Welcome Julie Coonrod (unmgrad)

Dashboard Applicants Bundles Routing Rules

CREATE A BUNDLE Settings Applicants REVIEWERS Customize Finish

### Assign Reviewers to *Plants*




Type of Review: Public | Review Method: Parallel

Select users that will be reviewing applications assigned to this bundle. Exactly one head reviewer must be selected. The head reviewer will be required to provide a Final Recommendation for all applications in the bundle.

#### All Users

Gibson, Alisa	+
Heatherington, Kat	+
Meier, Ezra	+
Murphy, Rikk	+
Switzer, DJ	+

#### 3 Assigned Reviewers

 HEAD REVIEWER	Gonzales, Marc IT	
 Goble, Cameron IT		-
 Coonrod, Julie Graduate Studies		-

[← Back to previous step](#) Save Save & Continue

The next screen, CUSTOMIZE, will allow you to (1) alter what summary information you will see for each applicant, (2) alter the sections of the application your reviewers should see, and (3) will allow you to write specific questions for your reviewers to answer.

### Customize Review for *Plants*

Type of Review: Public | Review Method: Parallel

Save Save & Continue

This is where reviewers view applications and provide feedback. Add a few fields that are most important to them. You may also change the review questions that they must complete.

Want to reuse another review? [Copy and edit an existing one.](#)

SAMPLE DATA

JohnDoe

Select a field

#### 1 SUMMARY

Choose the fields below that are most important. The rest of the application is available to reviewers below the summary.

Last	Mixed	
First	Mixed	
Name of Institution†	XXXXXXXXXXXXXXXXXX	
Degree Earned†	XXXXXXXXXXXXXXXXXX	
Cumulative GPA	22#.##	
Program	XXXXXXXXXXXXXXXXXX	
Interest	XXXXXXXXXXXXXXXXXX	
Additional Interests	XXXXXXXXXXXXXXXXXX	
Other Interests	XXXXXXXXXXXXXXXXXX	
Term	XXXXXXXXXXXXXXXXXX	

Add a summary field

#### 2 SECTIONS

Choose the sections below you want to include in Review Sheet. You may want to remove or re-order sections based on the Reviewer's need. **You can also change each section's display name.**

Additional Information

Add a section

#### 3 QUESTIONS

Choose the questions that you want reviewers to answer. You may edit or delete questions below by clicking the pencil icon. You may also add questions using the drop-down selector at the bottom of the review sheet.

##### Your Review

Complete the questions below. Your answers will be visible to your peers once you finish your review. If you are a Head Reviewer, you may see multiple areas in which to enter a recommendation, depending on how your school has configured the review sheet and what questions have been required for all reviewers. Please be sure to complete the "Final Recommendation" field along with any other required fields.

##### Overall Impression

★★★★★

##### Your Recommendation

Choose...

##### Recommend for Another Program

If you recommend that this candidate be admitted to a different program, enter the suggested program below. Otherwise, leave this blank.

##### Additional Comments

##### Julie's test question

Please rate candidate's potential to be a TA.

★★★★★

##### Final Recommendation \*

Choose...

Select question type

On the left hand side of the CUSTOMIZE interface, you can control what applicant information is used to summarize applicants. For example, some programs may want to include GPA and GRE scores in their summary of the applicant while others may prefer that only name be visible. You can delete default summary fields, add summary fields, and re-order how the summary fields appear.

**1 SUMMARY**  
Choose the fields below that are most important. The rest of the application is available to reviewers below the summary.

Last	Mixed	Use arrows to reorder fields	
First	Mixed		
Name of Institution1	XXXXXXXXXXXXXXXX		
Degree Earned1	XXXXXXXXXXXXXXXX		
Cumulative GPA	zz#.##		
Program	XXXXXXXXXXXXXXXX		
Interest	XXXXXXXXXXXXXXXX		
Additional interests	XXXXXXXXXXXXXXXX		
Other Interests	XXXXXXXXXXXXXXXX		
Term	XXXXXXXXXXXXXXXX		




Add a summary field **Add**

The dropdown menu allow you to add more fields



Hobsons ApplyYourself was used to develop our online application. Based on departmental feedback, different programs see different sections of the application. For example, most programs in the humanities see a Writing Sample section while programs in the sciences do not. Although reviewers will see the entire application, you must include all section for which you want them to score or make comments on a review sheet.

**2 SECTIONS**  
Choose the sections below you want to include in Review Sheet. You may want to remove or re-order sections based on the Reviewer's need. *You can also change each section's display name.*

 <b>Additional Information</b>	<input type="text" value="Additional Information"/>	↕
 <b>Writing Sample</b>	<input type="text" value="Writing Sample"/>	↕
 <b>Assistantship Interest</b>	<input type="text" value="Assistantship Interest"/>	↕

Add a section

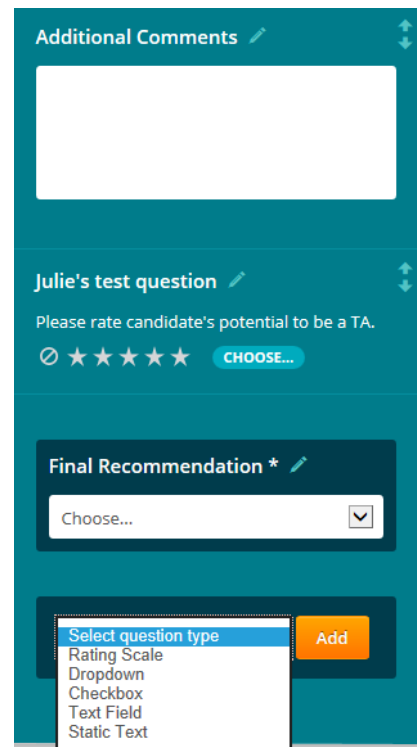
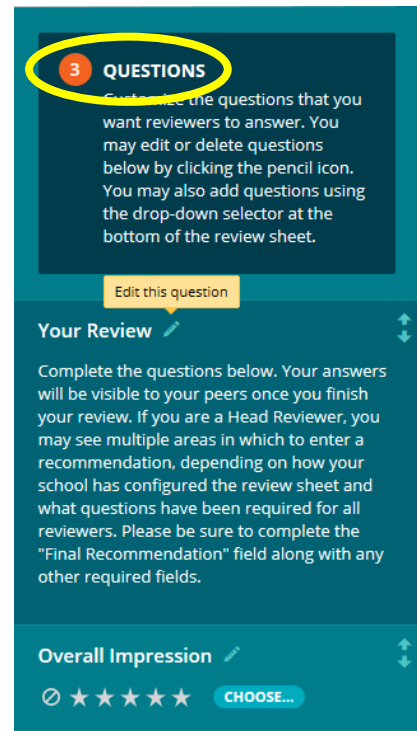
- Educational Background
- Additional Education
- Program of Interest
- CAS required
- Test Scores
- Letter of Intent
- CV Resume
- Relevant Coursework
- Special Requirements

Coordinators are able to customize the review sheet for each bundle. The review sheet will appear to the reviewer just as it appears to the coordinator in this interface. The review sheet displays along the right hand side of the interface in a turquoise color.

A few default questions will appear that are easily edited by clicking the pencil icon.

To add additional questions, go to the bottom of the turquoise review sheet. Utilize the 'Select question type' pulldown menu to choose 5 different types of questions that you can create for your reviewers. Because these questions are easy to add and delete, I encourage you to create each type of question to determine what will most meet your needs. Note that the Rating Scale will only result in a five star rating as shown in Julie's test question on the right.

If you want to use a numeric scale that will later be utilized in a scoring matrix, try using the Dropdown questions type.



Enter the appropriate Label and Instructions. Use the Add button (blue plus sign) at the bottom to include more dropdown choices. Finally, you can make the question required of reviewers before you click the orange Add button to add to your review sheet. The question will then show on the review sheet as shown below.

When you are done customizing your bundle, click Save & Continue. The FINISH interface will summarize all the steps you just took, allowing you to go back and edit Setting, Applicants, Reviewers, and Customization. If you are pleased with your bundle you should activate it, by clicking the orange Activate Bundle button. (To familiarize yourself with what reviewers will see and do, please look at the *AppReview Tutorial for Reviewers*.)

## Plants

Activate Bundle

Review the following and activate it when you're ready. Once active, reviewers will be notified and can then enter their reviews.

SETTINGS <span>EDIT</span>		REVIEWERS (IN ORDER) <span>EDIT</span>	
Bundle Name	Plants	<b>Cameron, Goble</b> IT	REVIEWER
Type of Review	Public	<b>Julie, Coonrod</b> Graduate Studies	REVIEWER
Review Method	Parallel	<b>Marc, Gonzales</b> IT	HEAD REVIEWER
Due Date	12/11/2013		



### Review Sheet

SUMMARY DATA <span>EDIT</span>		REVIEW SHEET QUESTIONS <span>EDIT</span>	
Last	Mixed	Your Review	Static text
First	Mixed	Overall Impression	Rating scale
Name of Institution1	XXXXXXXXXXXXXXXXXX	Your Recommendation	Dropdown
Degree Earned1	XXXXXXXXXXXXXXXXXX	Recommend for Another Program	Text field
Cumulative GPA	zz#.##	Additional Comments	Text field
Program	XXXXXXXXXXXXXXXXXX	Julie's test question	Rating scale
Interest	XXXXXXXXXXXXXXXXXX	Writing Ability	Dropdown
Additional interests	XXXXXXXXXXXXXXXXXX		

### Applicants EDIT | [VIEW ALL](#)

**CURRENTLY ASSIGNED**  
[Martin, Cheryl](#)

  	<h3>Plants</h3>	<p>due on: <b>Dec 11, 2013</b></p> <p>created by: <b>Coonrod, Julie</b></p> <p>owner: <b>Coonrod, Julie</b> <span>EDIT</span></p> <p>assign: <a href="#">Applicants</a>   <a href="#">Reviewers</a></p>
	<p>progress:</p> <p><b>0%</b></p> <p>1 applicants (0 reviewed)</p>	

The bundle will then show up on your Activated Bundle list. The reviewers will be notified by email that they have applications ready to review.

5. Rather than individually selecting applicants for your various bundles, you are able to set up Routing Rules. Routing Rules simply route applicants into bundles based on rules or criteria that the coordinator determines. From the Coordinate tab, Routing Rules is selected.

Note that if a coordinator has access to review pools for more than one department, the correct review pool needs to be selected here.

Enter a name for your Routing Rule and select a Bundle where applicants will be assigned (note that bundles must be created before routing rules can be created.) The dropdown boxes will allow you to choose items that are in the application. In many instances, Coordinators will use 'Interest' 'Is Equal To' such that applicants are grouped by interest. However, routing rules could also put applicants in a priority bundle based on GPA or test scores. Each department is able to alter how they create and populate bundles to best fit their needs.