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+.**

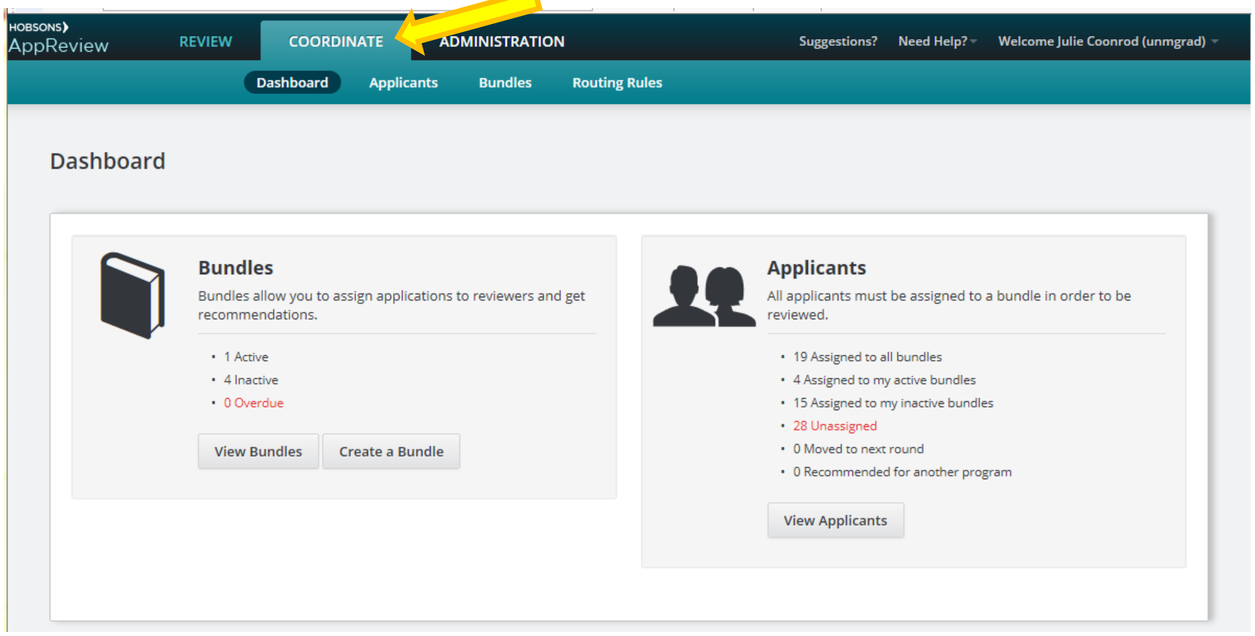
Coordinator: A person in a department that will create bundles of applications for review. For example, a graduate program advisor (most often staff member) might create bundles based on applicants' research interests. The following tutorial is intended to guide *coordinators*.

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

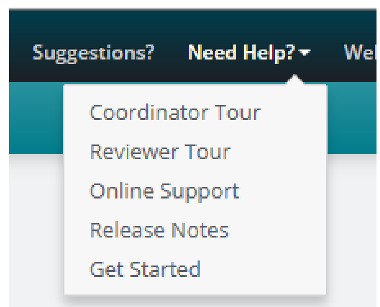
1. You are able to access AppReview from MyUNM. Although the system uses your UNM netID, an account must be created for all users. Julie Coonrod <jcoonrod@unm.edu> is currently creating these accounts. Login to AppReview using your netID and password.

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.



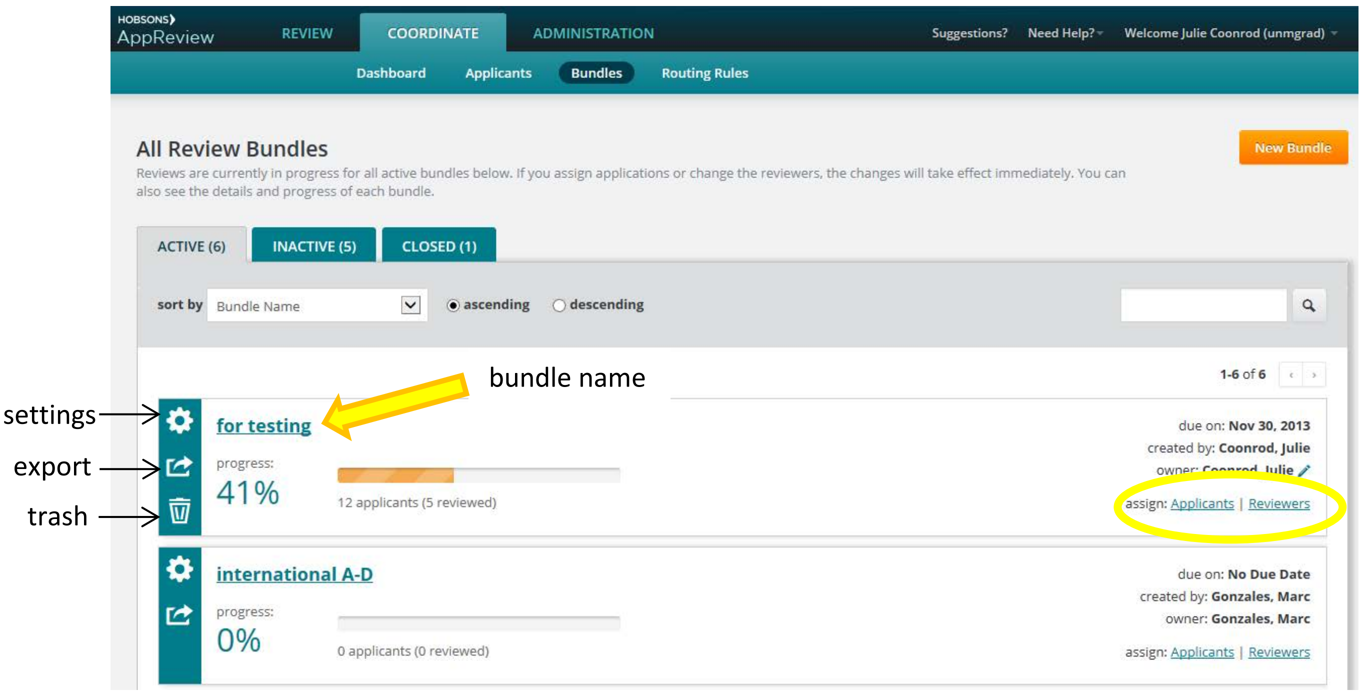
The COORDINATE tab will allow you to choose between the Dashboard, Applicants, Bundles, and Routing Rules. On the Dashboard, the Coordinator will see a summary of bundles on the left and a summary of applicants on the right.

A bundle is simply a group of applications with something in common. For example (as an over-simplification), 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.

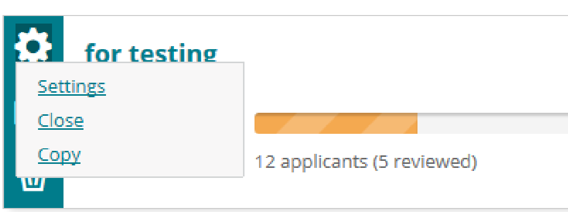
The Applicants shown on the right will be all the applications that have been submitted to the department for which the coordinator has access.

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 indicated 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.

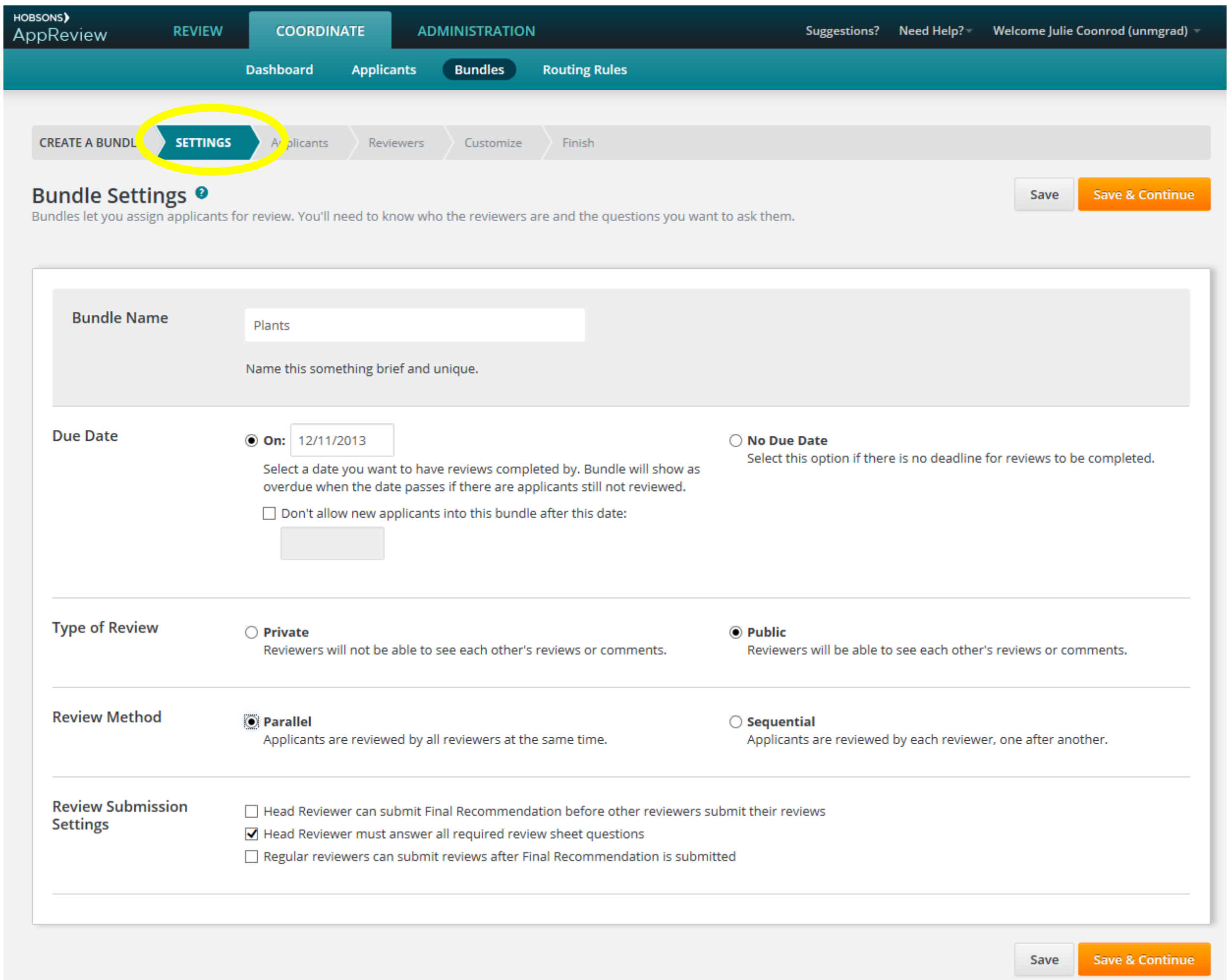


For an active bundle, you may do quite a bit in this interface. In the above screen capture, there is a bundle named 'for testing'. You can see the date the bundle was created and by whom. Also, you can see how many of the applicants have been reviewed. It is simple to add Applicants or Reviewers to 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

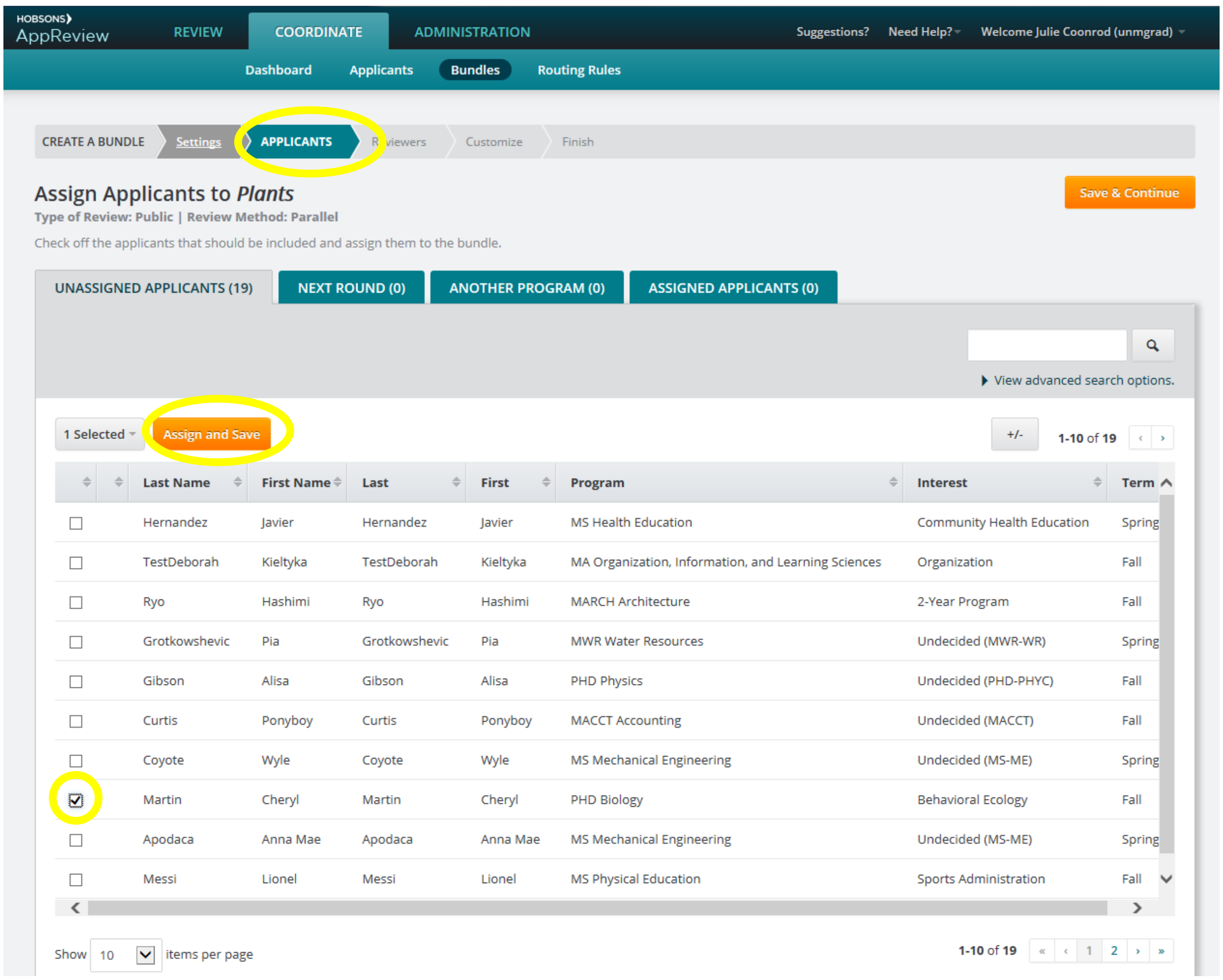


export a bundle and an icon to trash a bundle (assuming that you're the owner.) If you explore the Bundle Settings, you will see an interface just like you will when you create a new bundle. The next section will deal with this interface.

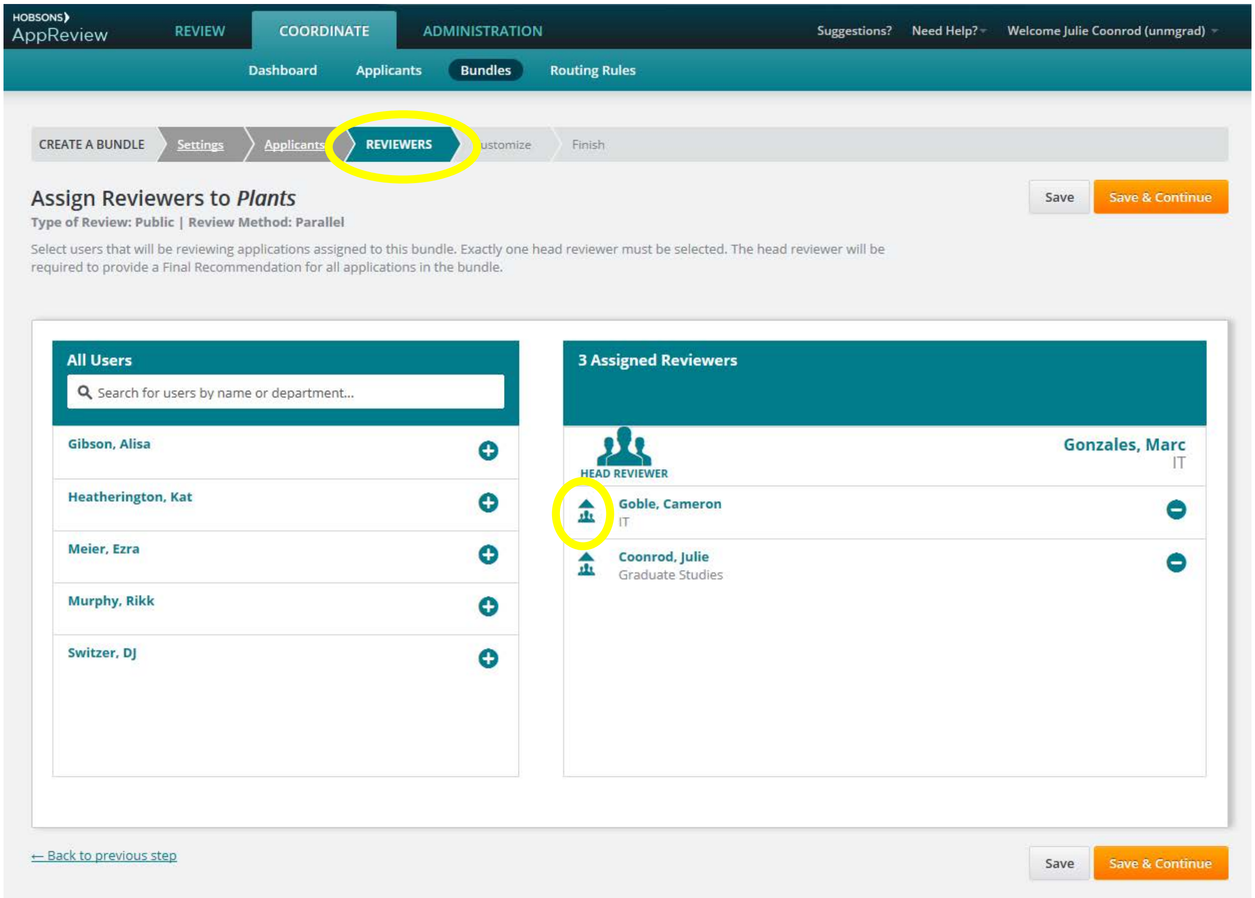
4. You can create a bundle by clicking the appropriate button on the Dashboard or by clicking the orange New Bundle building on the Bundles page. You will be walked through sequential steps: Settings, Applicants, Reviewers, Customize, Finish. Most items on the SETTINGS page should be self-explanatory.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



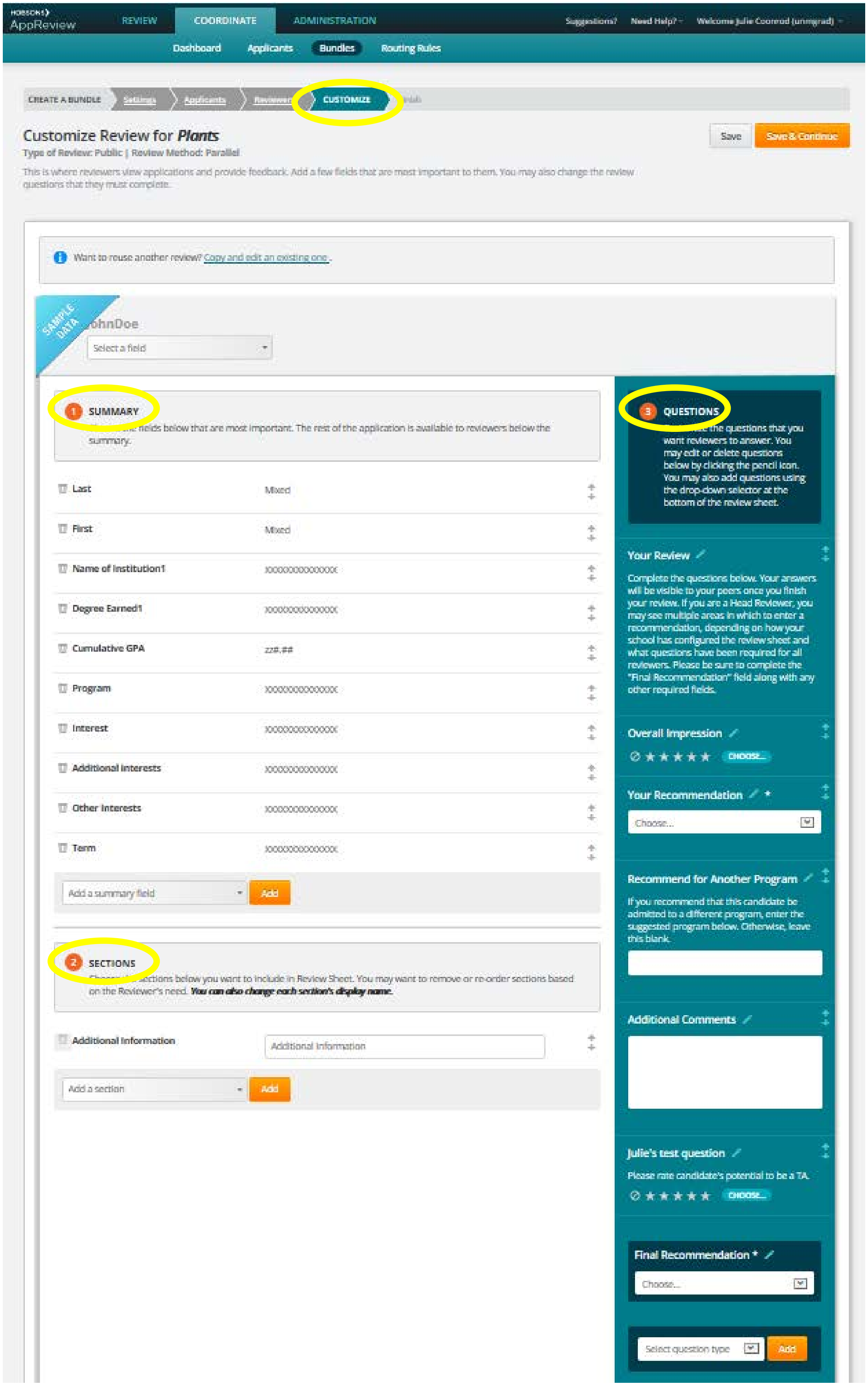
You'll then progress to the Applicants part of creating a bundle. You will see a list of all UNASSIGNED APPLICANTS. *This tutorial has been created with dummy applications in the system. Once live, a coordinator should only see applications for their assigned department.* Select the appropriate applications 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.



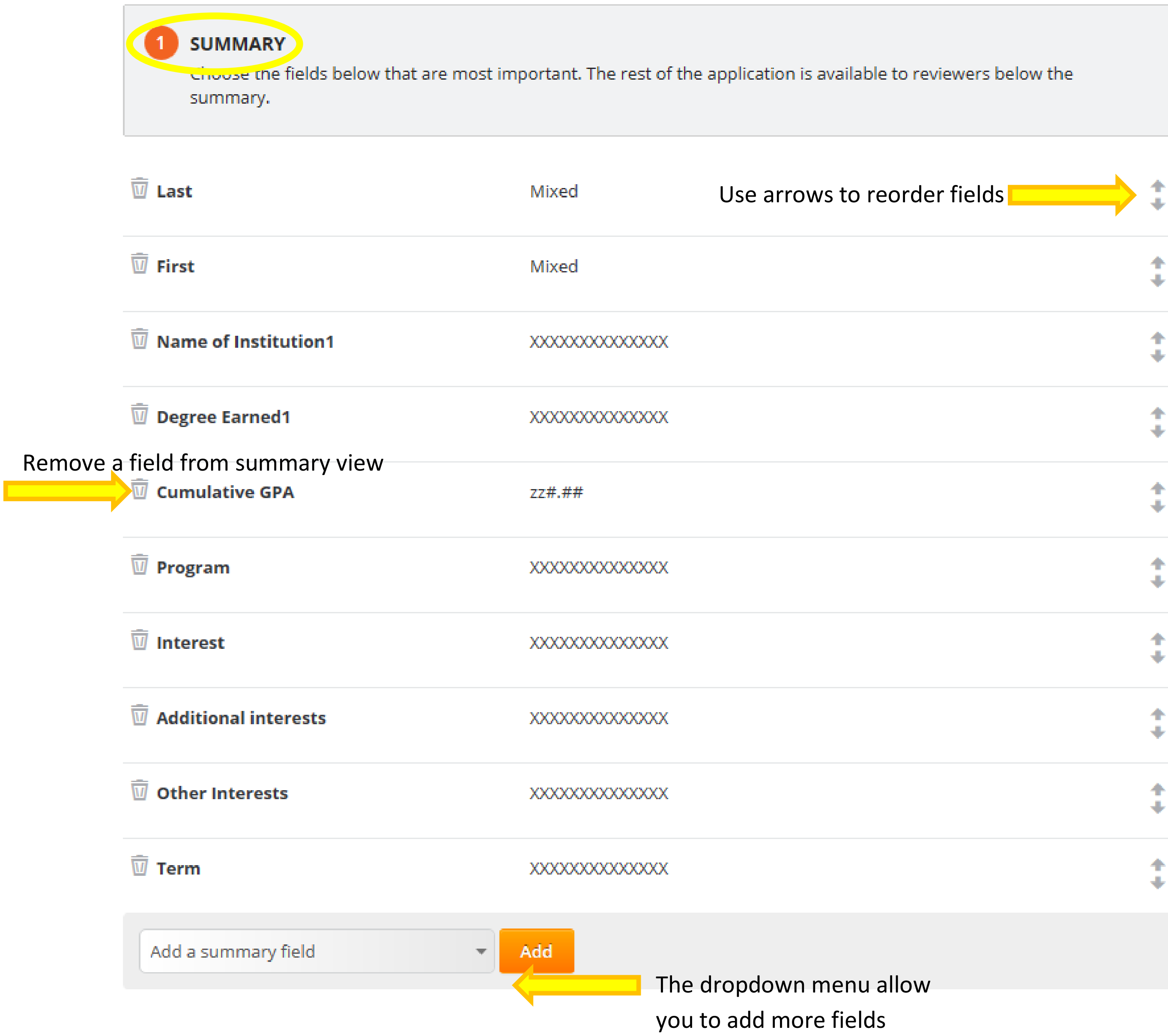
Select the appropriate reviewers for your bundle by pushing the plus sign next to their name. You should then see them move from the left hand side to the right hand side of the screen. There must be a Head Reviewer for each bundle. Note that you can click the icon to the left of the Assigned Reviewers 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.



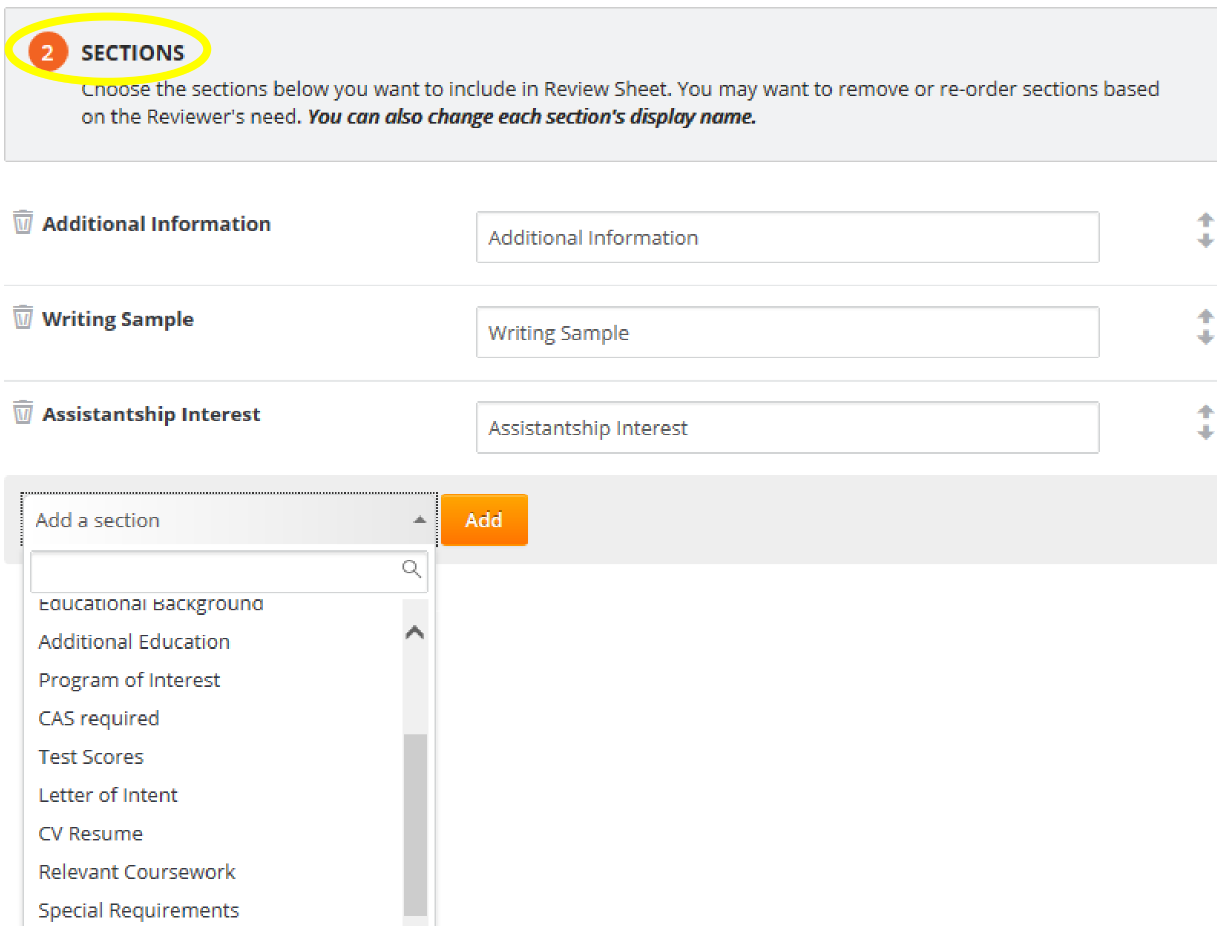
The next screen, CUSTOMIZE, will allow you to (1) alter what summary information you will see for each applicant, (2) alter the sections of the application your reviewers should see, and (3) will allow you to write specific questions for your reviewers to answer.


HOBSONS
AppReview
REVIEW
COORDINATE
ADMINISTRATION
Suggestions?
Need Help?
Welcome Julie Coorrod (unmgrad)
Dashboard
Applicants
Bundles
Routing Rules
CREATE A BUNDLE
Settings
Applicants
Reviewers
CUSTOMIZE
Save
Save & Continue
Customize Review for Plants
Type of Review: Public | Review Method: Parallel
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
Select a field
1 SUMMARY
fields below that are most important. The rest of the application is available to reviewers below the summary.
Last
Mixed
First
Mixed
Name of Institution1
Degree Earned1
Cumulative GPA
zz#.##
Program
Interest
Additional Interests
Other Interests
Term
Add a summary field
Add
2 SECTIONS
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
Additional Information
Add a section
Add
3 QUESTIONS
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
CHOOSE...
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.
CHOOSE...
Final Recommendation *
Choose...
Select question type
Add

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.

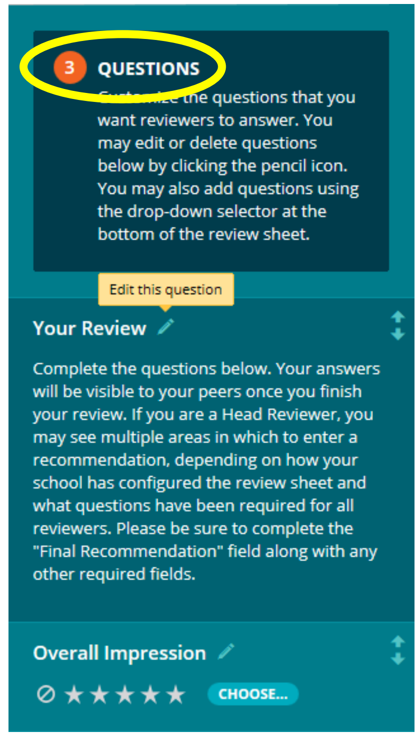


Hobsons ApplyYourself was used to develop our online application. Based on departmental feedback, different programs see different sections of the application. For example, most programs in the humanities see a Writing Sample section while programs in the sciences do not. Although reviewers will see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



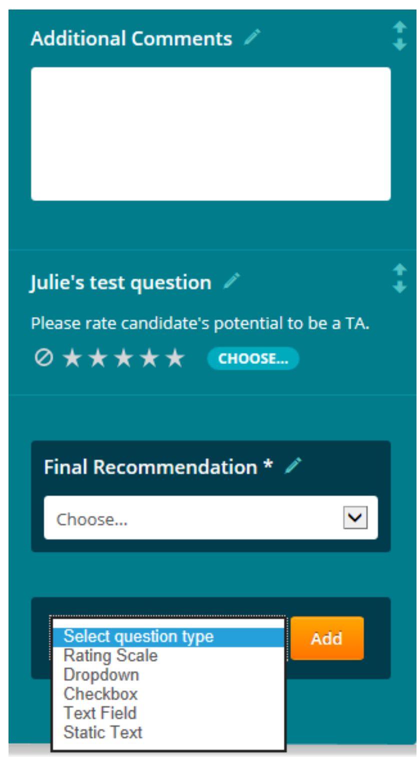
Coordinators are able to customize the review sheet for each bundle. The review sheet will appear to the reviewer just as it appears to the coordinator in this interface. The review sheet displays along the right hand side of the interface in a turquoise color.

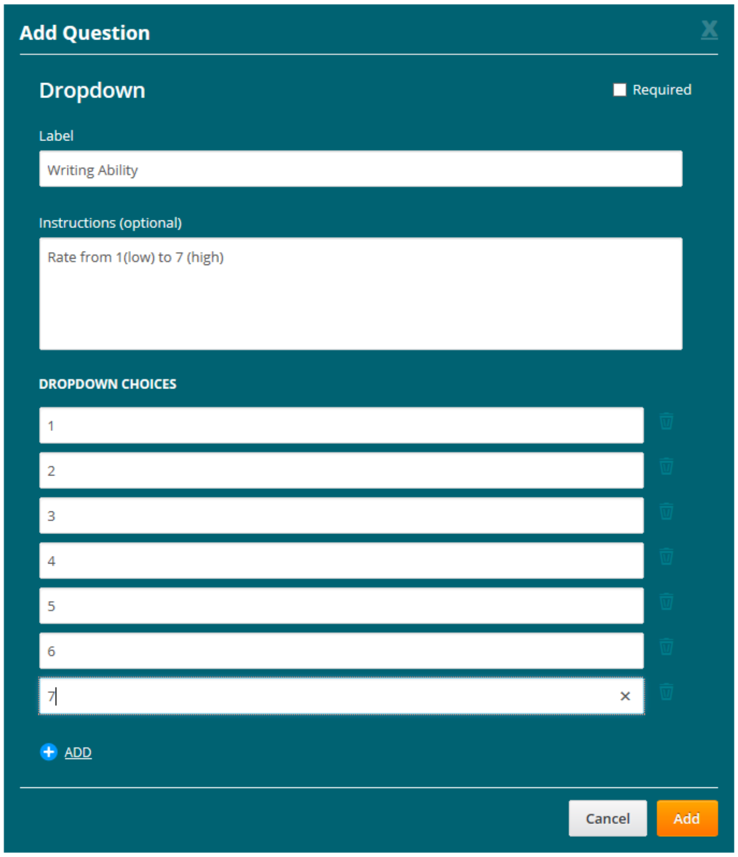
A few default questions will appear that are easily edited by clicking the pencil icon.



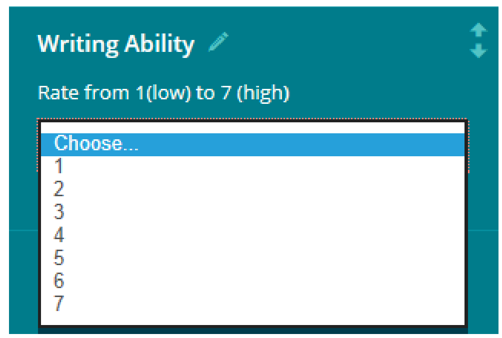
To add additional questions, go to the bottom of the turquoise review sheet. Utilize the 'Select question type' pulldown menu to choose 5 different types of questions that you can create for your reviewers. Because these questions are easy to add and delete, I encourage you to create each type of question 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.

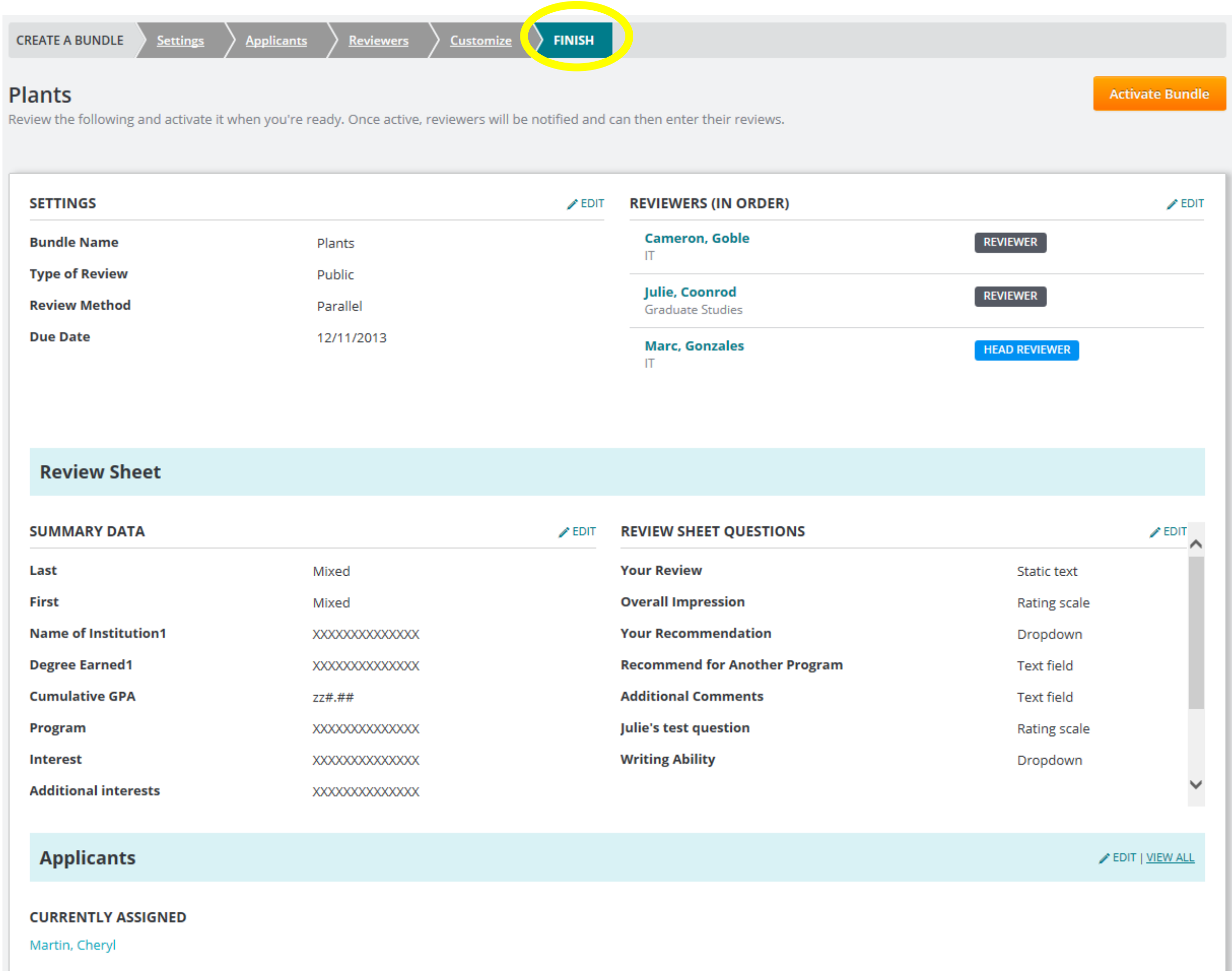


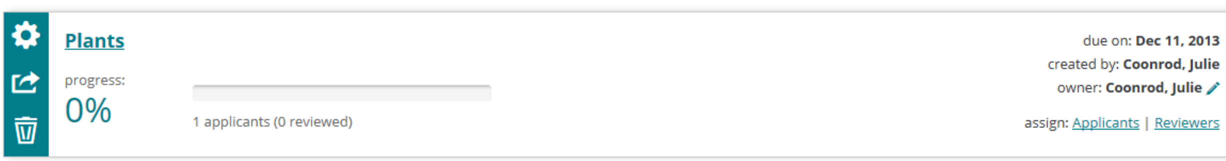


Enter the appropriate Label and Instructions. Use the Add button (blue plus sign) at the bottom to include more dropdown choices. Finally, you can make the question required of reviewers before you click the orange Add button to add to your review sheet. The question will then show on the review sheet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



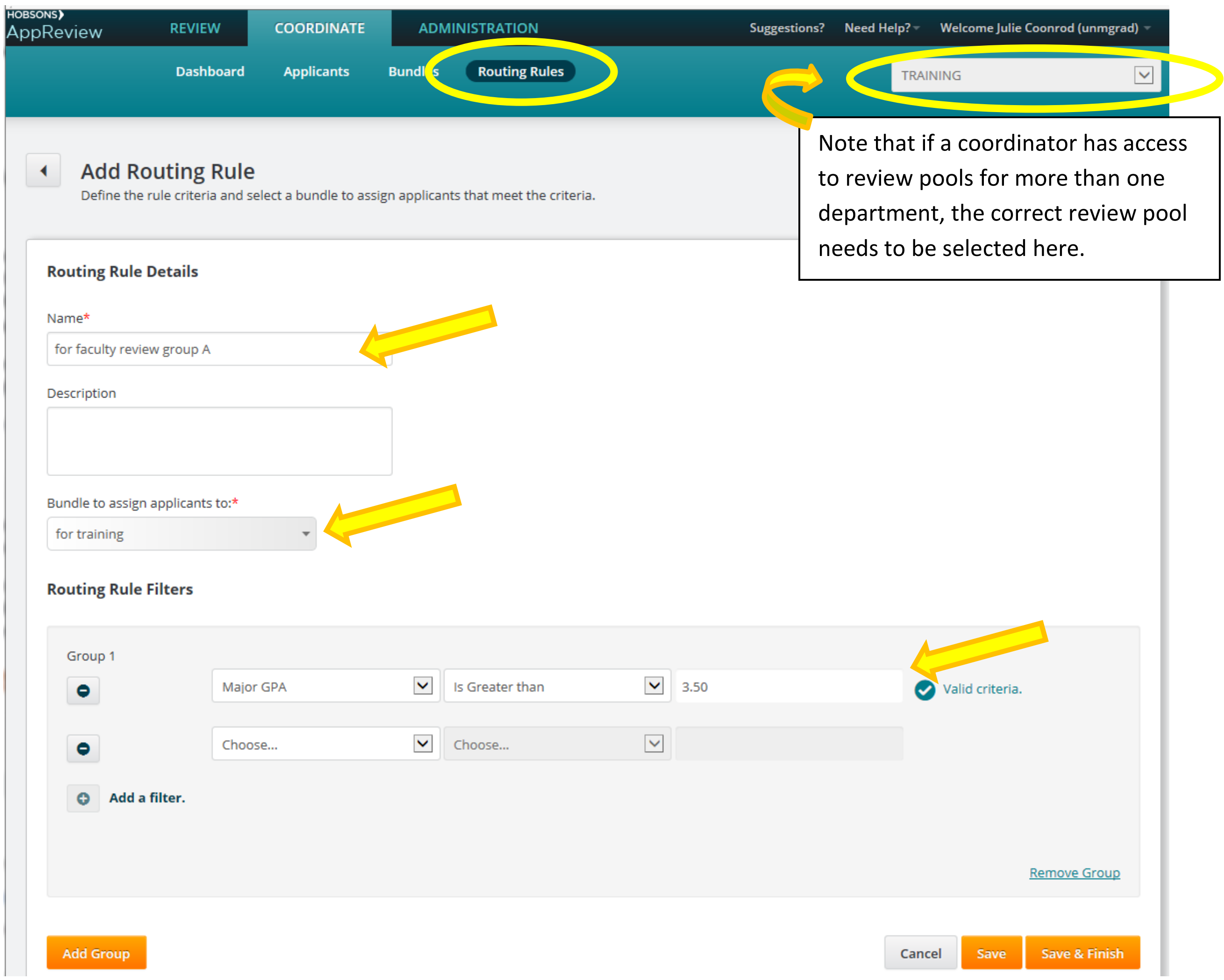
When you are done customizing your bundle, click Save & Continue. The FINISH interface will summarize all the steps you just took, allowing you to go back and edit Setting, Applicants, Reviewers, and Customization. If you are pleased with your bundle you should activate it, by clicking the orange Activate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





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.



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.