

# RECRUITMENT MANAGER GUIDE

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#### INTRODUCTION

The new Recruitment Manager profile has been designed to ensure that all levels of manager have access to a wide range of information about their recruitment activities within an easy-to-use environment. The following functionality will be available for Recruitment Managers:

- Submit a request to recruit
- View recruitment campaigns
- View applications
- Conduct shortlisting
- Schedule candidates for interview
- Make an offer
- Run management information reports

If you have line management responsibilities as part of your role you will be allocated a Recruitment Manager account. You will have full access to all your recruitment campaigns.

As a recruiting manager, you will have been given the relevant access through the Recruitment Manager function in order to carry out the full range of your recruitment management responsibilities. You do not have access to sensitive information of applicants.

#### DATA PROTECTION

As Recruitment Manager contains detailed position information including salary scales it is important that you use it responsibly to ensure that the security of this information is maintained at all time.

Therefore, when you have finished using Recruitment Manager please always ensure that you logout.

It is also important that you **never let anyone else know your username and password** as this information would allow people to access information on you and your staff through Recruitment Manager, exposing a risk of identity fraud.

## HOW TO ACCESS RECRUITMENT MANAGER

You can access Recruitment Manager from any internet connected computer device. You can access via your St Mary's computer or device, your own home computer, laptop, tablet, iPad, iPhone or Smartphone.

To access on iPad and iPhone

- Add the following URL address in your address bar: <u>https://ce0230li.webitrent.com/ce0230li\_ess/ess/index.html#/login</u>
- On your device select the 'Send To' icon



- At this stage you have 3 options:
  - 'Add to Favourites' and click save
  - 'Add Bookmark' and click Save
  - 'Add to Home Screen' and click Add

Now the icon will appear on your home screen like an app would.

## TO ACCESS FROM A ST MARY'S SITE

- Go to the StaffNet page
- Click on the PeopleNet icon and logon with your usual ESS username (your payroll number found on the back of your staff ID) and password
- Select People Manager link from the quick links menu on PeopleNet

#### TO ACCESS REMOTELY FROM A PERSONAL DEVICE

• Go to URL - https://ce0230li.webitrent.com/ce0230li web

Once you have accessed Recruitment Manager, you will see the login screen below appear.

Login with your **PeopleNet** user name (your payroll number with a leading zero i.e. 0526890) and password, then click Login.



The login screen will refresh to allow you to select which role you want to access. To access your Recruitment Manager view you will need to select **Recruitment Manager** from the drop-down menu provided.

If you are a first-time user you will need to reset your password to setup your account.

#### HOW TO ACCESS THE RECRUITMENT MODULE

To access the recruitment module, go to your Recruitment Manager Home Page and select **Recruitment** from the Sections Menu.

#### 1. RECRUITMENT AND REQUISITION SUMMARY SCREENS

The recruitment role includes two summary screens that will provide an overview of your current open recruitment campaigns.

#### 1.1. Recruitment Summary

Click on the recruitment section to load the Recruitment Summary screen.

	44	Recruit	nent summary			
Alerts	No data to b	e displayed due	to preferences being turned off			
Open requisitions (6) Search by name	e, location	٩				
Name 👻	Applicants 🗘	Published 🗘	Location 🗢	Start date 🗘	Application end date	Requisition end Cate
Business Applications Developer (SMU10018)	3	Yes	St Mary's University, Waldegrave	02/11/2020	02/11/2020	
Communications Manager (SMU10014)	3	Yes	St Mary's University, Waldegrave	20/10/2020	20/10/2020	
Fixed Term Hourly Paid Academic Staff (SMU1001	71	Yes		12/08/2020		
Lecturer in Drama (SMU10017)	0			30/10/2020		
Planning Analyst (SMU10010)	0	Yes	St Mary's University, Waldegrave	11/08/2020	18/09/2020	
Request to Recruit     Shortlistin	ng > M	L Make an Offer	INKS			
New- Requisition details	View E	Existing Requis	ition Details			

The recruitment summary provides you with an overview of the status of your open requisitions. Once a campaign is finished HR will close the requisition and it will no longer appear on this screen.

## 1.2. Requisition Summary

To drill down into a specific requisition, click on the requisition name to load the requisition summary.

o annon	Business Ap	plications Developer	(5101018)	
quisition details Applicants in total title iness Applications Developer	O Closing date in days Application end date 02/11/2020	O Pending applications Published? Yes	Recrui Mr Vie	tment manager dimir Putin
anage applicants shortListing (3) ON H	IOLD PENDING DECISION (0)	SCHEDULE FOR INTERVIEW (0)	FIRST INTERVIEW (0)	JUMP TO STAGE DOWNLO
Applicant details George West (AAAAAA1111) Internal Applied on 02/11/2020	Attachments 90)	Current Salary ≑	Location 🗘 Notice	Period  Stage notes No notes
Sir B	91) ALL DOCS			No notes
AAAAAA1111 Internal Applied on 02/11/2020				

This page gives you an overview for a single requisition and allows you to see the applicants that have applied for and reached each stage within the recruitment lifecycle.

If a candidate has marked themselves as self-certified disabled then a blue flag <sup>•</sup> will display against their name on the manage applicants' section.

You cannot make any changes to the recruitment campaign details on these screens. Please contact the HR Recruitment team if you require any amendments to be made via <u>HRhelpdesk@stmarys.ac.uk</u>.

## 2. REQUEST TO RECRUIT

The first part of the recruitment process involves creating a request to recruit in the form of a requisition. The requisition holds the details of the vacancy request and other information including:

- Reason for creation
- Advert closing date
- Shortlisting information
- Interview information

You should only be creating a requisition on Recruitment Manager if your Headcount Control business case has already been fully approved. Please contact <u>HRhelpdesk@stmarys.ac.uk</u> if you have any questions regarding the recruitment process.

#### 2.1. Create a new Request to Recruit

To submit a new requisition, click on the **New – Requisition details** link at the bottom of the Recruitment Summary screen.

		LINKS
✓ Request to Recruit	> Shortlisting	> Make an Offer
New- Requisition details		View Existing Requisition Details

Details on how to complete the requisition form are noted below.

Business	Applications Developer	
Requisition details 🗸 MENU	Fr	ter the name
Requisition	of	the role here
Requisition name <sup>®</sup> Bu	usiness Applications De	
Enter the current date (Today)	/U10018	
Start date® 02	2/11/2020	Click on the
Life cycle <sup>®</sup> Re	ecruitment (Modified) 🗸	select the recruiting
Recruiting manager	Roger Mills 🔤 🧟 😣	manager (yourself)
Vacancy for correspondence data But	usiness Aplications Developer (P10	]
Requisition category/type	ofessional Services	Select the role type
Select the reason for the request to recruit		
Reason for creation • Ne	ew post	

Once you have completed your requisition form, click **Save**. A notification will appear at the top of the page to confirm changes have been saved.

	Changes have been saved.	
Requisition details 🗸	MENU	C 🗗 🕖

Your requisition will now be visible on the Recruitment Summary screen with an ORANGE icon indicating the progress of the requisition:

Open requisitions (2) Search by red	quisition, location, dates	Q			
Name 🗢	Applicants 🗘	Location 🖨	Start date 🗘	Application end date 🗘	Requisition end date 🗘
Casual Student Ambassadors x5 (SMU10009)	0	St Mary's University, Waldegrave	25/06/2020	16/07/2020	
Planning Analyst (SMU10006)	Pending ap the Recruit	proval from St Mary's University, Waldegrave ment team	18/06/2020	16/07/2020	

Once the requisition has been authorised by the Recruitment team, you will be notified by email and the icon on the Recruitment Summary screen will change to BLUE:

Open requisitions (2) Search by	requisition, loca	ation, dates Q			
Name 🗘	Applicants 🗘	Location 🗘	Start date 🗘	Application end date 🗘	Requisition end date 🗘
Casual Student Ambassadors x5 (SMU1000	0	St Mary's University, Waldegrave	25/06/2020	06/07/2020	
Planning Analyst (SMU10006)	Author Recrui	rised by the itment team	18/06/2020	17/07/2020	

#### 2.2. View existing requisition details (vacancy)

Return to the Recruitment Summary screen by clicking on the navigation button at the top of the Requisition Summary screen:

< Recruitment

To view the basic details of your requisition/recruitment campaign e.g. reference number, closing date etc. select the name of the requisition on the **Recruitment Summary screen**:

Open requisitions (6) Search by na	me, location	Q				
Name 👻	Applicants ≑	Published 🗘	Location 🗘	Start date 🗘	Application end date	Requisition end 🗘 date
Business Applications Developer (SMU10018)	3	Yes	St Mary's University, Waldegrave	02/11/2020	02/11/2020	
Communications Manager (SMU10014)	3	Yes	St Mary's University, Waldegrave	20/10/2020	20/10/2020	

Alternatively, you can perform a search via the left-hand panel search field and then select the requisition you want to view details for:



Scroll down to your available links and select **View Existing Requisition Details** under **Request to recruit:** 

	LINKS
✓ Request to recruit > Shortlisting	> Make an Offer
New - Requisition Details	View Existing Requisition Details

Details of the requisition will display on this page (refer to section 1.2 for more information on this).

i Trent 03/11/2020 ×		(Recruitment Manager)	$\odot$
SEARCH FIND ITRENT PAGES	Business Applications Developer		
St Marys University Twickenham	Requisition details 🗸 MENU	C 🖶 🕕	
	Requisition		
Results 1 Record Business applicati Reg name 🛛 🗸 Q Business Applications Developer	Requisition name <sup>®</sup> Business Applications De Requisition reference SMU10018 Start date <sup>®</sup> 02/11/2020 <sup>□</sup> Life cycle <sup>®</sup> Recruitment (Modified) <b>v</b>		
	Recruiting manager     Roger Mills     C       Vacancy for correspondence data     Business Aplications Developer (P1C)       Requisition category/type     Professional Services       Academic     Academic		

\*If you need to make any changes to the information on this page please contact the Recruitment team via <u>HRhelpdesk@stmarys.ac.uk</u>

## 3. VIEWING APPLICATIONS

You can download an applicant's application form and any other documents which they have attached with their application from the **Requisition Summary screen**. To do this, select the **ALL DOCS** button next to the applicant's name and the application or attachment you want to download:

SHORTLISTI	NG (3) ON HOLD PENDIN	G DECISION (0)	SCHEDULE FOR INTERVIEW (0)	FIRST INTER	RVIEW (0) SECOND	INTERVIEW (0)
А	pplicant details 🗘	Attachments	Current Salary 🗘	Location 🗢	Notice Period 🗘	Stage notes
George West Internal Applied on 02/	11/2020	ALL DOCS				No notes
Sir B	(AAAAAA111191) 020	ALL DOCS				No notes
Laddi Ken External Applied on 02/	γ (ΑΑΑΑΑΑ1111 🖿	ALL DOCS	L			No notes

The selected attachment will open a PDF document which can be viewed for shortlisting purposes.

The PDF document can also be printed or saved to an external folder.

If you save applications outside of the recruitment system you must ensure this is not in a shared area and/or password protect the document(s). You will need to ensure that all applications stored outside of the recruitment system are deleted once the recruitment campaign is finished. Failure to do this could result in a breach of our Data Protection Policy regarding the storage and retention of applicant's information.

If you want to download all documents across all stages of the requisition or attachments for a single stage (e.g. Shortlisting), select the **DOWNLOAD** button and the stage required:

lanage applicants					JUMP .	O STAGE DOWNLOAD
APPLICATION RECIEVED (3)	SHORTLISTING (0)	ON HOLD PEND	NG DECISION (0)	REGRET AFTER	R SHORTLISTING (0)	Download all stages
Applicant details 🗢	Attac	chments Curre	nt Salary 🗢	Location 🗢	Notice Period 🗘	Application recieved
	AL	L DOCS				Shortlisting
Applied on 25/06/2020						On hold pending decision

You can also choose to download candidate applications in bulk via the Requisition Campaign Summary. To do this, please refer to section 3 for Shortlisting.

## 4. SHORTLISTING

Applications can be viewed once the advert has closed, however you should shortlist applications as per the guidance within the Recruitment & Selection policy.

#### 4.1. Review Requisition Campaign Summary

You will be notified by email when the advert for your vacancy has closed and candidates are ready to be shortlisted. To start shortlisting, click on the **Shortlisting** folder at the bottom of the **Requisition Summary** and select **Review Requisition Campaign Summary**.

	LINKS	
> Request to recruit	> Make an Offer	

The Requisition Campaign Summary provides you with a summary of the details for a selected requisition:



The page makes use of plus + and minus - icons which when clicked will expand or collapse the display of additional information.

To view a list of applicants who have submitted an online application, select the + plus icon next to **Applications**.

ocument attachments		
Business Applications Developer JD_v2.pdf	Ŧ	
Business applications developer advert_v2.docx	¥	

You can now click on the + icon next to the **Shortlisting** stage to view the applicant details (applications and any attached documents):

— Applications Candidate applications are listed below and are filte stages for the candidate information	ered by current application stage, please expand
+ Shortlisting (Applications: 2)	

ortlis	ting (Applications	:: 2)	Shows total r applications	number of received		
-	Mr M	4/07/2020 (AAAA/ Application print Mr M CV.pdf	AA111118) - Exter	Click to view individual a	w/download pplications	
	Miss Tammy	Application print	AAATTTT9)-E			

To view an individual application form, click on the button ± this will open a PDF document which can be viewed for shortlisting purposes.

The PDF document can also be printed or saved to an external folder.

If you save applications outside of the recruitment system you must ensure this is not in a shared area and/or password protect the document(s).

You will need to ensure that all applications stored outside of the recruitment system are deleted once the recruitment campaign is finished. Failure to do this could result in a breach of our Data Protection Policy regarding the storage and retention of applicant's information.

## 4.2. Download All Applications in Bulk

Click on **Download applications for this stage** on the **Requisition Campaign Summary** page to download all candidate application forms and attached documents:

	Application print	
	Miss Tammy CV.pdf 👤	
Downloa	ad applications for this stage	

You will be prompted with a confirmation screen asking if you want to continue with the bulk download process:



A message will appear to confirm the bulk application download is being compiled as a background process:

The application document download is being run as a background process. You will be notified upon its completion
ОК

You will receive an email to confirm the bulk application download process has finished and a message will also appear at the top of your Recruitment Manager screen:

<b>()</b>	Bulk recruitment	document	download	- completed
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An alarm icon will also appear at the top left-hand corner of your screen to notify you when the bulk application download process has completed:



Click on the alarm icon at the top of the page to go to your to-do/processes section of iTrent where you can download the applications. You can also access your to-do list from the Recruitment Manager homepage (refer to the People Manager guide for more information on this)

Select the **Processes** tab on your to-do list to view the completed process and click on the arrow next to the process to go to the downloads page:



You will be able to download your document by clicking on the arrow button – Download – icon:

< To do list / processes Busine	ess Applications [	Developer	
Download output All reports			C 🖯 🕕
View output from			
	Today	~	
Available report outputs			
Report name	Run date & time	Comments Download	Delete Select all
		Business Applications	
		Developer (SMU10018)	
Recruitment bulk document download	03/11/2020 12:51	- Stage:	
		Applicants	

The applications will be available to open/save as PDF documents stored in a compressed folder:

🔢 dm20200714213047-2Ko0-BULK	14/07/2020 21:33	Compressed (zipp	2,683 KB
------------------------------	------------------	------------------	----------

Appl	AppData > Local > Temp > dm20200714213047-2Ko0-BULK						Search dm20
^	Name	Туре	Compressed size	Password	Size		Ratio
	🔒 АААААА111118АРР01	Adobe Acrobat Document	53 KB	No		55 KB	5%
×*	🔒 АААААА111118АТТ02	Adobe Acrobat Document	957 KB	No		1,057 KB	10%
*	AAAAAA111119APP011	Adobe Acrobat Document	53 KB	No		55 KB	5%
*	AAAAAA111119ATT022	Adobe Acrobat Document	1,621 KB	No		1,871 KB	14%

If you save applications outside of the recruitment system you must ensure this is not in a shared area and/or password protect the document(s).

You will need to ensure that all applications stored outside of the recruitment system are deleted once the recruitment campaign is finished. Failure to do this could result in a breach of our Data Protection Policy regarding the storage and retention of applicant's information.

#### 4.3. Scoring

Shortlisting can be conducted after the advert closing date. Please note however – panel members must enter their scores/comments before the Recruiting Manager.

#### **Record final scores for applicants**

To begin shortlisting, navigate to the additional links under the **Requisition Summary** screen. To record scores on the recruitment system, select the **Shortlisting** folder from the

available links under the requisition summary screen and click on **2. Enter Final Shortlisting Scores**.

	LINKS	
> Request to Recruit Shortlisting	> Make an Offer	
8 0		
1. Review Requisition Campaign Summary	2. Enter Final Shortlisting Scores	3. Process Applicant to Interview Stage

Clicking on this link will take you to the shortlisting details page displayed below. All applicants will display on the left-hand panel, select an applicant's name for the shortlisting page to load for the chosen applicant.

iTrent 03/1	1/2020 X							(Recruitment Manager)	$\overline{\mathbf{O}}$
SEARCH FIND IT	RENT PAGES			E	Business Applications De	eveloper			
St Marys University Twick	enham	Applicant shortli	sting deta	ils Washington, George	✓ MENU			C 🖻 🕕	
REQUISITIONS Results 1 Record Req n Req n Business Applications De	Click applic name short	on the cant's to display listing	nt e	Requisition Business Applications Developer	Shortlisting criteria set: Business Applications Developer	Respons minir 0	e range num Er SC	Response range maximum oter the final core/comme	l nts
▲ APPLICANTS	detail	S		Shortlisting question	Shortlisting response	Criteria score	Comments		
, Sir B ) Laddi Ken West George	/	BAD - Knowledge and Q Qualified to or studying in computing or a relate equivalent work experies BAD - Knowledge and Q 2 Proficiency in the follow MSSQL Server, including Profiler o T-SQL stored I functions and triggers o web services BAD - Skills and Abilitie Experience of one or mo	ualifications for a degree d subject, or nce. ualifications ing areas: o SQL Server procedures, API and s re of the			2	Degree has r has used SQ use of other Used only or was minimal	ninimel computing L server, but vague on types of servers	
		+Reviewer: Abraham +Reviewer: John F Ke	Lincoln (Tota	al score: 23)	Expand the view panel scores/con	e + icon membe nments	to er		

You must complete the above for each applicant by selecting the applicants name from the list on the left-hand pane and entering the total scores against each shortlisting criteria.

Once you have entered the final scores against the applicant, click **SAVE**. A notification message will appear at the top of the screen to confirm the changes have been saved:

Changes have been saved.

The recruiting manager must record the final scores for each applicant on the recruitment system before candidates can be invited for interview.

#### 5. PROCESSING APPLICANT TO INTERVIEW STAGE

Once the Recruiting Manager has completed shortlisting on Recruitment Manager, the next step is to move the shortlisted candidates to the next stage on the recruitment system. This will allow HR to create and send the invite to interview emails.

To start this process, you will need to move shortlisted candidates to the **Schedule for Interview** stage of the recruitment campaign:

Select the **Shortlisting** folder from the available folders under the Requisition Summary screen and click on **3. Process applicants to interview stage**.

	LINKS	
> Request to recruit V Shortlis	ting > Make an Offer	
1. Review Requisition Campaign Sum	2. Enter Final Shortlisting Scores	3. Process Applicant to Interview Stage

You will be prompted to confirm the effective date (today):

Effective	e date
5	
Please enter the	e date you wish
to view or edit t	his information
from.	
10/07/2020	٥
OK	CANCEL

The Requisition Processing page will load and is used to process the applicants forward through the recruitment system:

Busin	ess Applications Develo	per	
Requisition processing (as o	f 03/11/2020) Business Application	s Developer	C 🖻 🕕
Update information Stage selectio	All		
	Offer On hold pending decision Schedule for interview	Select S	Shortlisting here

For the **Stage Selection** field, you must select the **Shortlisting** stage from the drop-down menu to start the process. Selecting the Shortlisting stage will load all applicants at the shortlisting stage of the recruitment campaign for the selected requisition:

Requisition p	rocessing (as of 03/	11/2020) Business Appl	ications D	eveloper G	) 🖨 🕕
Update information	Stage selection <sup>®</sup> Short Move to <sup>®</sup> Sche	ilisting 🗸	• • 🗑	Selecting this display a list of applicants at shortlisting sta recruitment ca	stage will of all the age of the ampaign
Applicants	Stage notes			This is the sta shortlisted car be moved to c save this page	ge that all ndidates will once you e
Applicant name		Applicant stage			~
Sir B	(AAAAAA111191)	Shortlisting			
Laddi Ken	(AAAAAA111197)	Shortlisting	Tick to ea	the box next ch shortlisted	
George West	(AAAAAA111190)	Shortlisting	cand	idate to select	
		SAVE	for in	to be invited terview	

To schedule candidates for interview you must select the **Schedule for interview** stage from the drop-down menu for the field '**Move to**'.

Select the shortlisted applicants you want to progress to schedule for interview stage of the recruitment campaign and click **SAVE**. A notification message will appear at the top of the screen to confirm the changes have been saved and an email will be sent to HR to invite the selected candidates for interview.



Candidates will be invited to book an interview slot via the online recruitment portal and the recruiting manager will be notified every time a candidate has booked/deleted an interview slot.

#### 6. MAKING AN OFFER

Once the interview process has been completed the recruiting manager must process the appointed candidate on the recruitment system.

To do this, select the **Make an Offer** folder from the available links in the requisition summary screen.

		LINKS
> Request to recruit	> Shortlisting V Make an	ffer
Make an Offer		

Select the Make an Offer button to load a list of candidates on the left-hand panel:

Business Applications Developer	Laddi Ken (AAAAAA1111 🏲 Applied on 02/11/2020	ALL DOCS
Sir B		
Laddi Ken		LINKS
West George	Request to Recruit     Shortlisting	Make an Offer
	, nequest to restart , shortholding	
	Make an Offer	

Select the name of the appointed candidate and confirm the effective date (today):



The Application details page will load showing the appointed candidates (in this example we are appointing George West) stage details.

To make an offer, you must change the stage to **Offer** stage on this page, this will now reload the page with additional details of the offer.

Application details (as of 03/11/2	020) Business Applications Dev	veloper 🗸 MENU 😋 🖶 🕕
Stage details		
Applicant <sup>®</sup>	George West	to OFFER
Stage®	Offer 🗸	•••
Stage notes		
Offer Details		Select the recruiting vacancy
Vacant positions®	Business Aplications Develop	er (P1(∨
Start date	20/11/2020	
Expected occupancy end date	20/12/2021	Enter the anticipated start date for the new
Expected occupancy end reason	$\sim$	member of staff

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Select the vacancy for this requisition from the drop-down menu for **Vacant positions** and enter the **Start date** of the employee (this can be an anticipated start date or the start date discussed with the candidate during interview). You can also choose to enter an expected occupancy end date and add notes (for the attention of HR) against this appointment in the box provided. Once complete, click **SAVE**.

A notification message will appear at the top of the screen to confirm the changes have been saved and an email will be sent to HR to start the offer and appointment process for your new starter:

Changes have been saved.

You must also email a completed Appointment form to <u>HRhelpdesk@stmarys.ac.uk</u> as soon as you have completed this process on Recruitment Manager. The Appointment form template can be found here: <u>http://staffnet/services-</u> <u>departments/HumanResources/Documents/Recruitment/Appointment%20Sheet%20-</u> <u>%20Nov%202020.doc</u>

Once the offer has been made on Recruitment Manager, and on receipt of the Appointment form, HR will pick up from the system that you have offered the post and will issue a formal conditional offer and commence pre-employment checks.

HR will contact you once all the pre-employment checks are completed. You can then arrange a definite start date with the successful candidate

Please note that the start date of your new member of staff will be confirmed once HR have completed all pre-employment checks and a start date has been agreed with the new starter.

## HELPFUL CONTACTS

If you have any questions, queries or issues when using the recruitment system or about the recruitment process please contact: <u>HRhelpdesk@stmarys.ac.uk</u>

If your query is regarding your Recruitment Manager login please contact: <u>HRsystems@stmarys.ac.uk</u>