

HRIS Recruitment Training

REC03

For use by all departments whether live with e-Recruitment only or
e-Recruitment and Personnel



Quick Reference Guide to Manage Online Applications in Core HR

V1.8

This guide relates to the processes:

- Manage Applications & Shortlisting REC6
- Manage Interviews REC7
- Manage Offers / Checks REC8/9



Training Team
Business Services
and Projects

Contents

1.	Manage Applications & Shortlisting	3
1.1	Review and Submit Web Applicants	3
1.2	Screen Applicants.....	4
1.3	Generate Applications	7
1.4	Manage Attachments.....	10
1.5	Generate Shortlist Form	12
2.	Manage Interviews	14
2.1	Schedule Interviews	14
2.2	Generate Interview Invites	17
2.3	Generate Rejection Emails	18
2.4	Manage Attachments to Emails	19
2.5	Define Applicant Events.....	20
2.8	Add Referee Details	22
3.	Manage Repeat Recruitment.....	23
3.1	Recruitment Re-run Required - Advertising Not Being Repeated.....	23
3.2	Recruitment Re-run Required - Advertising To Be Repeated.....	23
4.	Appoint New Employee: Replan Appointment	25
4.1	Possible Alternative Candidate Interviewed?	26
5.	Manage Offers & Manage Checks.....	26
5.1	Record Offer (post personnel go live)	27
	<u>A1. Record verbal offer</u>	28
	<u>A2. Record accepted offer</u>	30
5.2	Complete Applicant Events.....	31
6.	Close the Vacancy	31
6.1	Ensure pre-requisites have been met:	31
6.2	For vacancies requiring Work Permit:	32
6.3	Enter Closing Date and Final Status:	32

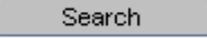
1. Manage Applications & Shortlisting

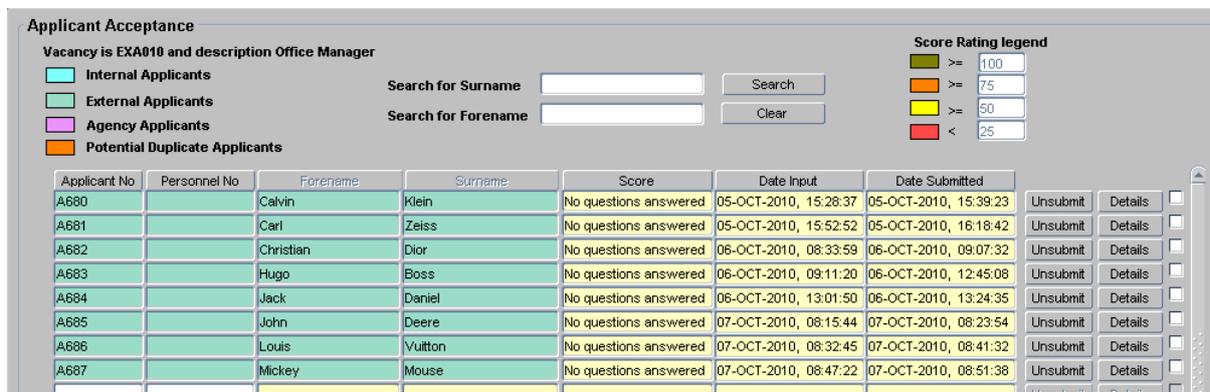
This section relates to process REC 6 Manage Applications and Shortlisting, (and should be read in conjunction with), the recruitment process outlined on the Personnel Services website at <http://www.admin.ox.ac.uk/personnel/recruit/recruitproc>.

1.1 Review and Submit Web Applicants

This will allow you to import all web applications.

Personnel > Recruitment > Maintenance > Submit Web Applicants

1. The *Submit Web Applicants* form will open. Enter your search criteria and click the  button.
2. Click once into the correct row before double clicking on the relevant vacancy to open it.
3. The *Applicant Acceptance* screen will be displayed and show a list of applicants who have submitted an application.

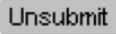


The screenshot shows the 'Applicant Acceptance' interface. It includes a search section with 'Search for Surname' and 'Search for Forename' fields, and a 'Score Rating Legend' with color-coded boxes for scores: >= 100 (dark green), >= 75 (orange), >= 50 (yellow), and < 25 (red). Below the search is a table of applicants with columns for Applicant No, Personnel No, Forename, Surname, Score, Date Input, Date Submitted, and buttons for Unsubmit and Details.

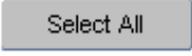
Applicant No	Personnel No	Forename	Surname	Score	Date Input	Date Submitted	Unsubmit	Details
A680		Calvin	Klein	No questions answered	05-OCT-2010, 15:28:37	05-OCT-2010, 15:39:23	<input type="checkbox"/>	<input type="checkbox"/>
A681		Carl	Zeiss	No questions answered	05-OCT-2010, 15:52:52	05-OCT-2010, 16:18:42	<input type="checkbox"/>	<input type="checkbox"/>
A682		Christian	Dior	No questions answered	06-OCT-2010, 08:33:59	06-OCT-2010, 09:07:32	<input type="checkbox"/>	<input type="checkbox"/>
A683		Hugo	Boss	No questions answered	06-OCT-2010, 09:11:20	06-OCT-2010, 12:45:08	<input type="checkbox"/>	<input type="checkbox"/>
A684		Jack	Daniel	No questions answered	06-OCT-2010, 13:01:50	06-OCT-2010, 13:24:35	<input type="checkbox"/>	<input type="checkbox"/>
A685		John	Deere	No questions answered	07-OCT-2010, 08:15:44	07-OCT-2010, 08:23:54	<input type="checkbox"/>	<input type="checkbox"/>
A686		Louis	Vuitton	No questions answered	07-OCT-2010, 08:32:45	07-OCT-2010, 08:41:32	<input type="checkbox"/>	<input type="checkbox"/>
A687		Mickey	Mouse	No questions answered	07-OCT-2010, 08:47:22	07-OCT-2010, 08:51:38	<input type="checkbox"/>	<input type="checkbox"/>

4. The system will have given each applicant a unique applicant number which will be displayed in the first column



If an applicant has requested to unsubmit an application (possibly to make a change or addition), click the  button.

After the closing date:

5. Select the applications to be submitted by clicking on the tick box to the right of the relevant applications (or click the  button).
6. Click the  button; this will import the applicants into Core.
7. Click the  button.

8. A confirmation message will appear, click **OK**. The selected applications will no longer be shown in the applicant acceptance screen. Their status will show as **Applied** against the vacancy in the Core back office.



After the vacancy closing date for priority candidates, you are required to review each application received to ensure that the letter of redeployment has been attached.



For any Priority Candidate applications received after the first closing date, the status of **Applied Late** can be chosen instead. This status may also be chosen if a vacancy has been re-opened to allow a late application to be submitted.

9. Click the  button to exit the form.

1.2 Screen Applicants

Personnel > Recruitment > Maintenance > Applicant Status

1. The *Search Criteria* form will open. Enter your selection criteria (normally the **Vacancy Id** and **Applicant Status** e.g. *Applied*) and click the  button.
2. The applicants that match the search criteria will be displayed.

Vacancy

Vacancy ID: EXA010 Office Manager

Location: []

Applicant Count: 8 Board Convenes Interview / Seminar: [] []

Positions: 1 Applicant Status: Applied

Vacancy Status / Date: Open Hold Filled Closed 05-OCT-2010

Search Applicant Detail Report Generate Applications

Applicants Schedules Applicant Schedules Interview Schedules

Applicant	Name	Overall Score	Type	Applicant Status	Comments	Status Date	Interview Date
A683	Boss Hugo		EXTERNAL	Applied		21-DEC-2010	
A684	Daniel Jack		EXTERNAL	Applied		21-DEC-2010	
A685	Deere John		EXTERNAL	Applied		21-DEC-2010	
A682	Dior Christian		EXTERNAL	Applied		21-DEC-2010	
A680	Klein Calvin		EXTERNAL	Applied		21-DEC-2010	
A687	Mouse Mickey		EXTERNAL	Applied		21-DEC-2010	
A686	Vuitton Louis		EXTERNAL	Applied		21-DEC-2010	
A681	Zeiss Carl		EXTERNAL	Applied		21-DEC-2010	

Examination Detail Appointment Offer Applicant Detail Application Detail Multiple Applicant Update Applicant Panel

 After the vacancy closing date for priority candidates, you are required to review each application to check that the letter of redeployment has been attached. Where the redeployment letter has been attached you should add 'Priority Candidate' into the Comments field against the relevant applicant(s), and generate and merge their applications and forward to the selection panel for consideration ahead of the final closing date.

- a. To view an applicant's application, click once in the relevant row and click the **Application Detail** button. The application will display in a new window.
- b. To view the applications of all applicants, click on the **Applicant Detail Report** button. The applications will display in a new window.



It is very important to review applicants and their applications to ensure all are valid applicants e.g. check previous employees have the right to return.

In the above example, update the Vacancy Events screen to show that *Right to Return* has been checked. Refer to REC00: Recruitment Basics for further details.

3. Where invalid applications are found, change the applicant status by clicking the *Status* drop-down and selecting **Invalid**. Enter the reason into the **Comments** field.
4. Click the  button.

1.3 Generate Applications

The application submitted by each applicant is made up of a number of parts. There are the web forms completed by the applicant online, such as Referee Details and the Questionnaire and then there are attachments, such as Supporting Statements and CVs. Whilst the online parts of the application form one document, each applicant can submit up to 5 additional attachments, with each of these being held as a separate document.

The Generate Applications process combines these separate documents into a single PDF file per applicant. We complete this process in two ways.



Firstly, an overnight job takes all applications that have been submitted and automatically generates the PDF, without any action being required by the recruitment administrator.

Secondly, following the closing date, the recruitment administrator submits the applicants to the back office and is then able to manually initiate this process in order to create the remaining PDF's for any applications received after the overnight process.

The process described in this document is the manual process as completed by the recruitment administrator.

The steps below refer to the manual process for generating applications and assume that the overnight job has worked as expected.

Personnel > Recruitment > Maintenance > Applicant Status

1. The *Search Criteria* form will open. Enter your selection criteria (normally the Vacancy Id and Applicant Status e.g. Applied) and click the button.
2. The applicants that match the search criteria will be displayed.
3. Click the button. The Generate Applications screen will appear.

Selection Criteria

Vacancy: EXA010 Office Manager Delete Merged Application

Status: All

Detail

Surname	Forename	Applicant No	Status	Application Created/Updated
Boss	Hugo	A683	Applied	<input type="checkbox"/> Not Created
Daniel	Jack	A684	Applied	<input type="checkbox"/> Not Created
Deere	John	A685	Applied	<input type="checkbox"/> Not Created
Dior	Christian	A682	Applied	<input type="checkbox"/> Not Created
Klein	Calvin	A680	Applied	<input type="checkbox"/> Not Created
Mouse	Mickey	A687	Applied	<input type="checkbox"/> Not Created
Vuitton	Louis	A686	Applied	<input type="checkbox"/> Not Created
Zeiss	Carl	A681	Applied	<input type="checkbox"/> Not Created
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

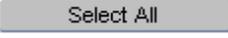
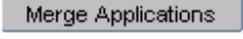
Select All Clear Selection Delete Selected Generate Applications Merge Applications Not Created

4. Select all applicants for whom you wish to generate a PDF file by clicking the tick box to their right (or click the Select All button).
5. Click the Generate Applications button.
6. A pop-up message will appear;



7. Click on the OK button. The pop-up window and the Generate Applications screen will close. As per the pop-up message, you will now receive an email to the email account linked to your personnel record once the job has been completed.

In the event that there is an error when generating the PDF, you will receive an email containing a reference number. You should forward this error message to hr.systems@admin.ox.ac.uk who will resolve the issue with the application.

8. Once you have received the email to confirm that your applications have been generated, return to the Applicant Status screen and click on the  button. The Generate Applications screen will appear and you will see a link to the right of each applicant. This link shows the date and time the PDF was created. You can click on this link to open and view the PDF file.
9. To merge the individual PDF files into a single PDF pack for distribution to the interview panel, proceed as follows:
 - a. Select the relevant applicants by clicking the tick box to the right of each applicant (or click the  button).
 - b. Click the  button.
 - c. You will see a pop-up message explaining that your request has been submitted and you will be sent an email when the job has been completed.
 - d. Once you have received the email, return to the Generate Applications screen and open the merged application pack by clicking on the date/time stamp link in the bottom right corner of the Generate Applications screen.
 - e. Select **Save As** from the **File** menu to save the PDF pack to a secure location, or refer to the support website for suggested approaches to managing shortlisting packs.



OUCS offer a facility called OxFile which supports the simple and secure exchange of large files with people inside and outside the University. Refer to <https://oxfile.ox.ac.uk/oxfile/> for further details.



Where there are applications for priority applicants, and the letter of redeployment has been attached, you should proceed to generate and merge these applications and forward to the selection panel for consideration as normal.

Follow steps 1.3 and 1.5 onwards contained within this quick reference guide.



To add an additional late application to the merged file, select **Delete Merged Application** and click **OK** to the warning message. Now create a new merged file following the instructions in section 1.3, but selecting only the late applicant in step 4, in order to generate their application.

Note: You will also create a new merged PDF when closing vacancies requiring a Work Permit, in order to keep a final record of all shortlisted applications. See section 6. Close the Vacancy

1.4 Manage Attachments

To view, add or ignore documents attached to the application by an online applicant:

Personnel > Recruitment > Maintenance > Applicant Status

10. The *Search Criteria* form will open. Enter your selection criteria (normally the Vacancy Id and Applicant Status e.g. Applied) and click the  button.
11. Click once to highlight the row for the relevant applicant.
12. Click the  button.
13. Select **Vacancy Detail** in the *Select Detail* area.
14. Click once to highlight the row for the relevant vacancy.
15. Right click over the highlighted row.
16. Select **View Documents** from the shortcut menu. You will be taken to the *Document Details* tab.

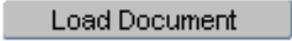
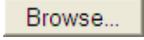
To Open a Document

- a. Click on the file name. The document will open in a new window.

To Exclude a Document from the Selection Panel PDF File

- a. Click to place a tick in the **Ignore** column against the relevant attachment.
- b. Click the  button.

To Attach an Additional Document

- a. If the additional document has been emailed to you by the applicant, save it to a secure network location.
- b. Click the  button. A new window will open.
- c. Click the  button.
- d. Click the  button.
- e. Browse to select the relevant document.
- f. Click the  button.
- g. Once the upload has been successful click the  button to return to Core.
- h. Click **Yes** to confirm the upload was successful.
- i. Click the  button.



If you had already generated the PDF's for the shortlisting panel you will need to re-generate them at this point to exclude the incorrect attachment and/or include the new one.

1.5 Generate Shortlist Form

Use this option to generate the shortlist form for the Interview panel to complete.

Personnel > Recruitment > Maintenance > Applicant Status

1. The *Vacancy* screen will open. In the **Vacancy Id** field, select your vacancy from the list of values.
2. Select the relevant **Applicant Status** from the drop down e.g. *Applied*.
3. Click the  button. A list of relevant applicants will be displayed.
4. Select **Tools > Letters** from the menu. The *Generate Letters Module* dialogue box will appear:
 - a. Ensure the *Letter Group* shows **Recruitment**.
 - b. Select the *Letter Type* **Shortlist Form A - Standard** or **Shortlist Form B – Extended**.
 - c. Select the *Selection* option to send to **All Query Records**.
 - a. Click the  button.
5. Microsoft Word will open the template and merge applicant data to a new document.
6. In the new document enter the relevant criteria in the column headings.
7. Save, print and distribute the form as required.
8. Close Word and return to Core (note that after closing the document, you will also need to close the letter template).
9. Click **No** to the confirmation message. This will stop the generation of a record in the letter history.



If you have any priority candidates it is important to indicate these against their entry on the form.

At this stage you should:

- 1 Change the status of the vacancy to *Shortlisting*.
2. Update the vacancy events checklist e.g. Right to Return check.



Once shortlisting has been completed and the panel has reported back with their decisions you should:

3. Change the status of the relevant applicants to *Shortlisted* or *Rejected after Shortlisting*.

See QRG REC00 Recruitment Basics for further details on updating statuses.

2. Manage Interviews

This section of the guide relates to process REC 7 Manage Interviews, (and should be read in conjunction with), the recruitment process outlined on the Personnel Services website at <http://www.admin.ox.ac.uk/personnel/recruit/recruitproc>.

2.1 Schedule Interviews

Personnel > Recruitment > Maintenance > Vacancy Detail

1. The *Search Criteria* form will open. Enter your search criteria and click the  button.
2. Double click the relevant vacancy to open it.
3. From the *Select Detail* area, select **Applicant Status**.
4. The *Applicant Status Maintenance* screen will be displayed. A list of applicants will be displayed.



Ensure all applicants have the correct status, e.g. Shortlisted or Rejected after Shortlisting (see REC00 Recruitment Basics quick reference guide for further details).

5. To show only those applicants who you wish to invite to interview, select the relevant status (e.g. Shortlisted) from the **Applicant Status** drop-down in the search area at the top of the screen. Click the  button.
6. Select the **Schedules** tab.
7. Click the  button. The *Add/Edit Schedule* screen will be displayed.

The screenshot shows a dialog box titled 'Add/Edit Schedule' with the following sections and fields:

- Description:**
 - Schedule Type:** Interview (dropdown menu)
 - Round:** 1 (dropdown menu)
 - Schedule No.:** 1 (dropdown menu)
 - Title:** (text input field)
 - Assign Type:** Individual (dropdown menu)
 - Applicant Status:** (dropdown menu)
- Scheduling:**
 - Venue:** (text input field)
 - Start Date:** (text input field)
 - Start Time:** (text input field)
 - End Time:** (text input field)
 - Duration:** (text input field)
 - Lead Time:** (text input field)
- Breaks:**
 - Morning:** (text input field)
 - Lunch:** (text input field)
 - Afternoon:** (text input field)
 - Duration:** (text input field)
 - Duration:** (text input field)
 - Duration:** (text input field)
- Misc.:**
 - Board Convened:** (checkbox)
 - No. Interview Slots:** (text input field)
 - No. Applicants:** 0 (text input field)
 - Special Needs:** (checkbox)
 - Applicant Selection Allowed:** (checkbox)
 - No. Interviewers:** 0 (text input field)

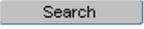
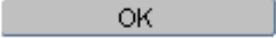
At the bottom are buttons for 'Cancel', 'Delete', and 'Save'.

- a. Select the **Schedule Type** e.g. Interview.
 - b. Select the **Round** and **Schedule Number** (if required).
 - c. Enter a **Title** e.g. Interviews for [job title].
 - d. From the **Assign Type**, select whether you want to schedule the interviews on an individual basis or as a group.
 - e. Select the **Status** of the applicants that you wish to invite (e.g. Shortlisted).
 - f. Enter the name of the **Venue**. This can include the full address so that it can be merged into the interview invite letter.
 - g. Enter the **Start Date** for the interviews (remember to use the format dd-mmm-yyyy).
 - h. Enter the **Start Time** and **End Time** for the interviews (e.g. between 9:00 and 17:00).
 - i. Enter the **Duration** and **Lead Time** (time after each interview) for each interview in minutes.
 - j. **Breaks** - enter the time and duration (in minutes) for each break required by the panel.
8. Click the  button.

2.2 Generate Interview Invites

For an example of how to send correspondence as email please see the 'Send Rejection Emails' section within this guide.

Personnel > Recruitment > Maintenance > Applicant Status

1. The *Vacancy* screen will open. In the **Vacancy Id** field, select your vacancy from the list of values.
2. Select the relevant applicant status e.g. *Shortlisted*.
3. Click the  button. A list of relevant applicants will be displayed.
4. Select **Tools > Letters** from the menu.
5. Ensure the **Letter Group** shows *Recruitment* and select the relevant letter type e.g. *Invite for first interview*.
6. Select the relevant option, either, **All Query Records** (to send to all the applicants returned from your search) or **Current Record** (to send to just the applicant currently selected).
7. Ensure the **Send Email** field is unchecked.
8. Click the  button. The letter will be generated.
9. In Word, respond to any Fill In prompts as required.
10. If necessary, amend the text further.
11. Save, print and post the letter as required.
12. Close Word and return to Core (note that after closing the letter document, you will also need to close the letter template).
13. Click **Yes** to the confirmation message. This will generate a record in the letter history screen.



For help on how to customise your letter templates please contact the HRIS Support Centre.



Once all the interview invitations have been sent you should change the status of the vacancy to *Interview* and the applicant status of invited applicants to *Invited to Interview 1* (see QRG REC00 Recruitment Basics for further details).

N.B. If you are planning a second round of interviews, once the invitations have been sent for round 2, change the applicant status of these applicants to *Invited to Interview 2*.

2.3 Generate Rejection Emails

This example uses the Core email functionality to generate correspondence. For an example of how to send correspondence as a Word document please see previous section above.

Personnel > Recruitment > Maintenance > Applicant Status

1. The *Vacancy* screen will open. In the **Vacancy Id** field, select your vacancy from the list of values.
2. Select the relevant applicant status e.g. *Rejected at Shortlisting* or *Rejected at Interview 1*.
3. Click the button. A list of relevant applicants will be displayed.
4. Select **Tools > Letters** from the menu.
5. Ensure the **Letter Group** shows *Recruitment* and select the relevant letter type e.g. **REJECTION AFTER SHORTLISTING** or **REJECT – PRIORITY CANDIDATE APPT.**
6. Select the relevant option, either, **All Query Records** (to send to all the applicants returned from your search) or **Current Record** (to send to just the applicant currently selected).
7. Click to select the **Send Email** field.
8. Click the button. The *Send Email* screen will be displayed.
9. Amend the email address shown in the **From** field to the email address you wish people to reply to.
10. Click the button to apply the new email address to all emails in this batch.

11. Whilst this should not be required for rejection emails, you can amend the content of the email if necessary.



If you have selected multiple recipients for the email, and wish to amend the email text, edit each in turn, navigating through the list of recipients by using the **Next>>** button.

2.4 Manage Attachments to Emails

If you wish to add an attachment to the email/s, follow section 2.3 above then:

1. Click the **Attachments** button.
2. Click the **Browse** button.
3. Browse to the document you wish to attach and click it once to select it.
4. Click the **Open** button.
5. To add further attachments, click into the next row down and repeat steps 13 – 15 above.
6. Click the **Save** button.
7. A confirmation message will display, click the **OK** button.
8. Click the **Close** button.
9. To add the same attachment to all emails, click the **Apply to All** button.
10. Click the **Send All** button. A confirmation message will appear, click **OK**.



Note: If you use the email type 'GENERIC EMAIL TEMPLATE' you must add an attachment for all recipients of that email.

The system can be used to administer different rounds of recruitment selection by repeating the steps outlined in sections 1.3 to 2.4 and selecting appropriately.

You should be careful to ensure the correct Vacancy and Applicant statuses have been applied at each stage. Please see QRG REC00: Recruitment Basics for further details of the uses of this information.

2.5 Define Applicant Events



Having completed the interview exercise the selection panel will hopefully have selected a preferred candidate. Depending on the candidate and the post, specific checks will be required.

Personnel > Recruitment > Maintenance > Vacancy Detail

1. If necessary, search for and open the relevant vacancy.
2. Select **Events** from the *Select Details* area. The events tabs will be displayed.
3. Select the **Applicant Events** tab.
4. For each check that is required for the preferred candidate place tick in the checkbox to the right of the item.
5. Click the button. A confirmation message will appear, click **OK**.

2.6 View Referees

It will be possible to view the referee details once an applicant has made an application for a vacancy.

Personnel > Recruitment > Maintenance > Applicant Details

1. The *Search Criteria* form will open. Enter your selection criteria (normally the Applicant No., click the  button and select the applicant from the list provided) and click the button.
2. Click once to highlight the row for the relevant applicant.
3. Double click on the highlighted row to open the Applicant Maintenance screen.
4. Select **Vacancy Detail** in the *Select Detail* area.
5. Click once to highlight the row for the relevant vacancy.
6. Right click over the highlighted row.
7. Select **View References** from the shortcut menu. You will be taken to the *Reference Details* tab.
8. To view the full details of a referee, click the button.
9. To close the referee details, click the button.

10. To exit the referee details screen, click the  button.



Where applicant details have been added via the manual route, the referee details can be edited and added to.

If the applicant has applied online, the referee details can only be viewed.

2.7 Edit Referee Details – manual applicants only

Referee details may have changed since the time of application. Use this section to amend the referee details for any applications which have been entered via the manual application route.

Personnel > Recruitment > Maintenance > Applicant Details

1. The *Search Criteria* form will open. Enter your selection criteria (normally the Applicant No., click on the  button and select the applicant from the list provided) and click the button.
2. Click once to highlight the row for the relevant applicant.
3. Double click on the highlighted row to open the Applicant Maintenance screen.
4. Select **Vacancy Detail** in the *Select Detail* area.
5. Click once to highlight the row for the relevant vacancy.
6. Right click over the highlighted row.
7. Select **View References** from the shortcut menu. You will be taken to the *Reference Details* tab.
8. To access the full details of a referee, click the button.
9. Make the required changes.
10. Click the button.
11. To exit the referee details screen, click the  button.

2.8 Add Referee Details

The applicant may be required to supply further referee details. Use this section to add details of further referees.

Personnel > Recruitment > Maintenance > Applicant Details

1. The *Search Criteria* form will open. Enter your selection criteria (normally the Applicant No., click on the  button and select the applicant from the list provided) and click the  button.
2. Click once to highlight the row for the relevant applicant.
3. Double click on the highlighted row to open the Applicant Maintenance screen.
4. Select **Vacancy Detail** in the *Select Detail* area.
5. Click once to highlight the row for the relevant vacancy.
6. Right click over the highlighted row.
7. Select **View References** from the shortcut menu. You will be taken to the *Reference Details* tab.
8. To add a new referee, click the  button.
9. Complete the fields as required.
10. Click the  button.
11. To exit the referee details screen, click the  button.

3. Manage Repeat Recruitment

This section of the guide relates to process REC 7a Manage Interviews and should be read in conjunction with the recruitment process outlined on the Personnel Services website at:

<http://www.admin.ox.ac.uk/personnel/recruit/recruitproc>.

On occasions, having completed the shortlisting and interview process, it may not have been possible to choose a preferred candidate.

3.1 Recruitment Re-run Required - Advertising Not Being Repeated

Personnel > Recruitment > Maintenance > Vacancy Details

Where a preferred candidate has not been found and it is not planned for the advertising to be repeated then change the vacancy status to 'No Appointment Made' and close the vacancy.

Ensure all applicants are correctly updated with their final status before you do so.

Refer to **6 Close the Vacancy** at the end of this quick reference guide.

3.2 Recruitment Re-run Required - Advertising To Be Repeated

Where it is planned for the advertising to be repeated, as part of the recruitment re-run, it will need to be decided whether the vacancy will now be advertised externally. Approval is required from the Joint Group prior to the vacancy being advertised externally.

In order to seek approval, a case needs to be submitted to the Joint Group.



Use the Recruitment Protocol Form available on www.admin.ox.ac.uk/personnel/recruit/recruitproc/planapprove/protocol/

Notification will be sent from the Joint Group to advise whether the case for external advertising has been approved or rejected.

3.2 a Request for External Advertising Rejected

Personnel > Recruitment > Maintenance > Vacancy Details

After being notified that the Joint Group has rejected your request for external advertising, it will need to be decided whether to repeat the internal-only advertising.

Where it is decided not to repeat the internal-only advertising, then the vacancy should be closed with a status of 'No Appointment Made'. All applicant statuses must be updated to reflect the final status before closing the vacancy.

Refer to **6 Close the Vacancy** at the end of this quick reference guide.

If it has been decided that internal-only advertising will be repeated, then start the process again by creating a new vacancy.

Please refer to REC01: Creating a Vacancy in CoreHR for further details.

The original vacancy needs to be closed; refer to **6 Close the Vacancy** at the end of this quick reference guide.

Remove the appointment from the old vacancy and add to the new one.



To set up the vacancy and recruitment details, refer to REC01: Creating a Vacancy in CoreHR quick reference guide.

To update the Vacancy Events; refer to REC00: Recruitment Basics in CoreHR quick reference guide.

3.2 b Request for External Advertising Approved

Personnel > Recruitment > Maintenance > Vacancy Details

Where external advertising has been approved by the Joint Group and confirmation has been received by the recruitment administrator, create a new vacancy, (refer to REC01: Creating a New Vacancy in CoreHR quick reference guide).

Update the old vacancy with a status of 'No Appointment Made' and ensure all applicant statuses have been updated to reflect the final status before closing the old vacancy.

Refer to **6. Close the Vacancy** at the end of this quick reference guide.

Remove the appointment from the old vacancy and add to the new one.

4. Appoint New Employee: Replan Appointment

This section of the guide relates to process REC 7b Appoint New Employee: Replan Appointment and should be read in conjunction with the recruitment process outlined on the Personnel Services website at <http://www.admin.ox.ac.uk/personnel/recruit/recruitproc>.

Where a preferred candidate has been appointed or a new starter has not started, i.e. not commenced, or has left shortly after commencement, this process enables you to review whether there is an alternative candidate who could be approached, or the vacancy needs to be re-advertised.

Where it is decided to refill the appointment, it should be checked whether the planned appointment is within 6 months of the original request. Where the planned appointment is within 6 months, then no protocol approval is required. The departmental approver or divisional approver, (depending on protocol required), can send an off-system request via email to the Reward Team to request a new a planned appointment.

Once received, the Reward Team will review the request for a new planned appointment and will notify you when the planned appointment has been authorised.

Contact the Reward Team: Reward@admin.ox.ac.uk

If required, seek approval for external advertising:

www.admin.ox.ac.uk/personnel/recruit/recruitproc/planapprove/protocol/.

4.1 Possible Alternative Candidate Interviewed?

4.1a Yes

1) Where a possible alternative candidate has been interviewed, contact them in the first instance to see if they are still interested in the role.

2) Where the alternative candidate is still interested, the new planned appointment will need to be linked to the original vacancy, refer to REC01: Creating a Vacancy within CoreHR quick reference guide.

Update the Applicant Status to Preferred Candidate and follow through the process contained within this guide, '5.1 Record Offer'.

Personnel > Recruitment > Maintenance > Vacancy Details

4.2 a No

1) Where a possible alternative candidate has been interviewed, but is not now interested in the role, or an alternative had not been interviewed, set up a new vacancy and add in the recruitment details as required. Refer to REC01: Creating a Vacancy in CoreHR quick reference guide.

2) Follow the steps contained in REC01: Creating a Vacancy in CoreHR quick reference guide, to link the new planned appointment to the new vacancy.

3) Update Vacancy Events to show that the vacancy is being re-advertised and follow the steps within REC00: Recruitment Basics and REC01: Creating a Vacancy in CoreHR quick reference guides and continue with the standard recruitment process.

5. Manage Offers & Manage Checks

This section of the guide relates to process REC 8 Manage Offers and 9 Manage Checks, (and should be read in conjunction with), the recruitment process outlined on the Personnel Services website at <http://www.admin.ox.ac.uk/personnel/recruit/recruitproc>.

Having made a verbal offer to your preferred candidate the checks linked to the applicant will need to be initiated off-system and then logged.

At this stage you should:

- 1 Change the status of the vacancy to *OFFER MADE*.
2. Update the applicant events checklist when checks are initiated.
3. Change the status of the applicant to *Offer Made (if pre-personnel 'live')*, or *Offer Made – Personnel* (if post-personnel 'live'). See 5.1 below for subsequent steps.



Note: The updating of these statuses at each stage is imperative for equal opportunities monitoring and reporting.

See QRG REC00: Recruitment Basics for further details on updating statuses.

5.1 Record Offer (post personnel go live)

Personnel > Recruitment > Maintenance > Applicant Status

If your preferred candidate applied via e-recruitment, having made a verbal offer to them the details should be captured in the Recruitment module. **(Section A1)**

When the candidate accepts the offer, the details should be updated against the relevant vacancy **(Section A2)** before the vacancy is closed.



Note: 'Recruitment Administrator' access is required for this action.
Both sections A1 and A2 must be completed.

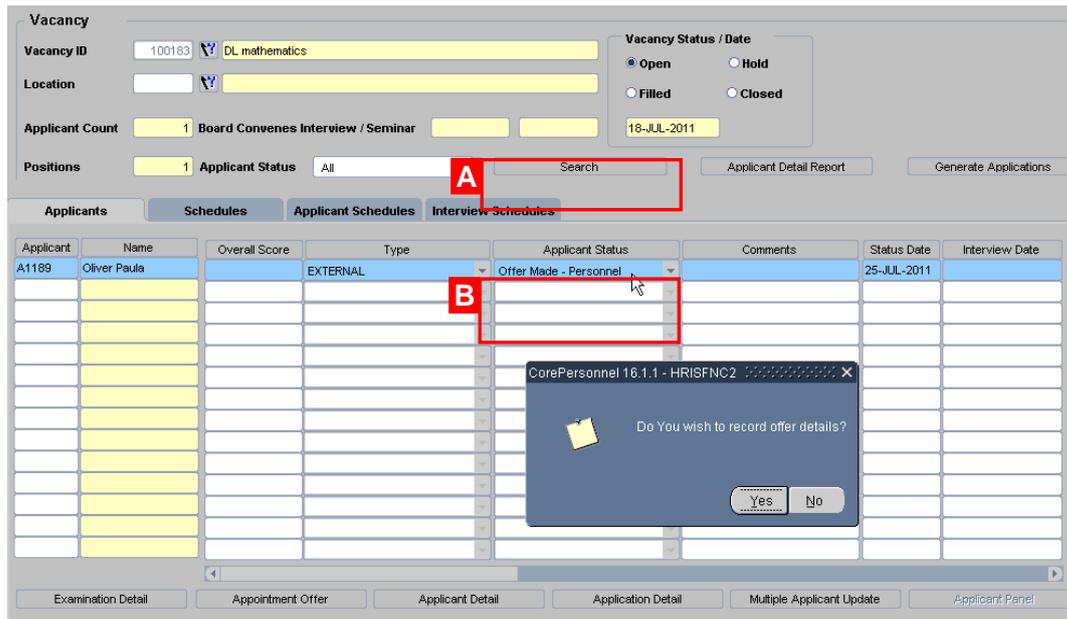
Recruitment > Maintenance > Applicant Status

A1. Record verbal offer

1. Enter the vacancy number into the **Vacancy ID** field and click



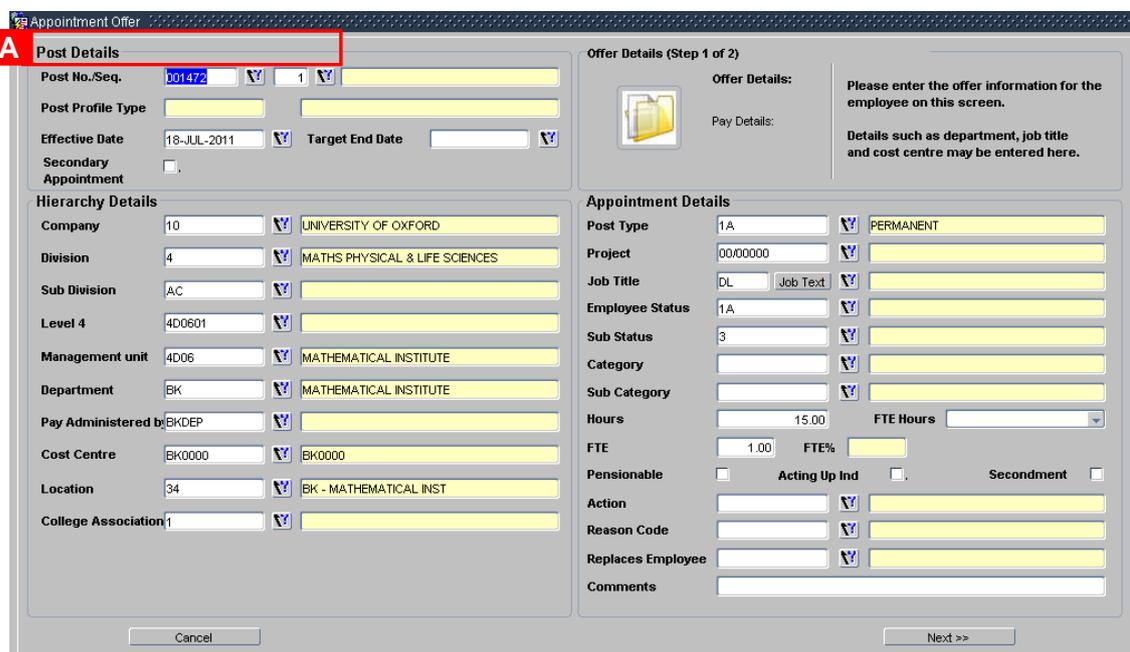
2. Update the status of the preferred candidate to **Offer Made – Personnel** [B].



3. A message will be displayed 'Do you wish to record offer details?'

click the  button.

In the *Appointment Offer* screen:



4. Select the **Post Number [A]** using the LoV icon then press the **[Tab]** key.

5. Select the **post number sequence [A]** using the LoV icon then press the **[Tab]** key.



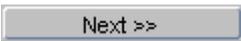
Note: If the post number or post number sequence you are expecting is not in the LoV list then contact HRIS Support.

6. Enter/change any details relevant to the offer details e.g.



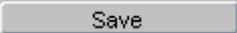
Note: If preferred, this information can be left for now and completed at appointment stage.

Field Name	Description
Effective date	Expected start date.
Job Text	This is the actual job title that will appear in the template documents, such as the conditional offer/contract letter.
Employee status	e.g. Permanent, Fixed term.
Sub Status	e.g. Full time, Part time.
Hours	Expected working hours per week, as agreed with the individual.
FTE Hours	Standard FTE hours for this role (depends on grade).
Comments	Record anything of interest about the offer made.

7. Click the  button:

8. If required change/check any details relevant to the pay details.

Field Name	Description
Point	Grade point
Multiplier	Ensure this matches the FTE

9. Click the  button, then click the  button. The *Applicant status* window is re-displayed.

A2. Record accepted offer

When the verbal offer has been accepted, the details must be captured in the recruitment module in order that they can be pulled through to personnel.

Follow steps 1-9 above but remember to update the status of the preferred candidate to **Offer Accepted – Personnel**.

Applicant	Name	Overall Score	Type	Applicant Status	Comments	Status Date	Interview Date
A1189	Oliver Paula		EXTERNAL	Offer Accepted - Personnel		25-JUL-2011	

5.2 Complete Applicant Events

Personnel > Recruitment > Maintenance > Applicant Detail

1. Search for and open the relevant applicant record.
2. Select **Events** from the *Select Details* area. The event tab will be displayed.
3. As each required event is initiated, click in the **Checklist** field to add a tick. The completion of each required event will be recorded within CoreHR personnel. (See QRG PA0: Pre Arrival for further details).
4. Click the  button.



Ensure you also update the **Vacancy Events** screen to mark all the relevant Equal Opportunities monitoring events.

6. Close the Vacancy

Personnel > Recruitment > Maintenance > Vacancy Detail

These steps must be completed once the vacancy has been filled, or if it needs to be closed for any other reason.

6.1 Ensure pre-requisites have been met:

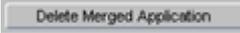
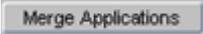
- The Applicant and Vacancy Events **MUST** be completed with all information relevant to the vacancy. This forms part of the review of recruitment procedures and practices and ensures the 'Code of Practice on Staff Recruitment and Selection' is operating effectively.
- The Applicant and Vacancy Statuses **MUST** be updated before a vacancy to reflect the latest/final status for each. Where the vacancy is being closed due to a direct appointment, use the vacancy status 'Appointment Made'. Further information can be found in the Statuses and Events guidance which can be found here <http://www.admin.ox.ac.uk/personnel/recruit/recruitproc/vacancyssetup/>

6.2 For vacancies requiring Work Permit:

For vacancies requiring a work permit, UKBA (the UK Border Agency) requires you to keep a copy of all applications, in their original format, relating to all applicants who were shortlisted for that vacancy.

The following steps have been confirmed to meet this requirement:

Personnel > Recruitment > Maintenance > Applicant Status

1. Repeat steps 1, 2 and 3 from section 1.3 Manage Applications in this guide in order to open the 'Generate Applications' window for the vacancy.
2. Click . This will remove the date and time link in the bottom right hand corner of the Generate Applications window and will therefore remove the full PDF application pack initially created for the Selection Panel.
3. Still within the same window, put a tick in the checkbox next to each candidate who had been shortlisted for interview.
4. Click . The system will merge the selected applicants into a combined PDF file of just the shortlisted applicants. Once complete, a link will appear to the right of the button showing the date and time the PDF was created. The file should open automatically.
5. If necessary, click the date and time link to open the PDF. Select **Save As** from the **File** menu to save this file to a secure location for reference in relation to UKBA queries.

6.3 Enter Closing Date and Final Status:

Personnel > Recruitment > Maintenance > Vacancy Detail

1. The *Search Criteria* form will open. Enter your selection criteria and click the  button. The *Vacancy Detail* screen will be displayed.

Vacancy

Vacancy Id: 100023

Vacancy Status / Date:

 Open

 Hold

 Filled

 Closed

 Date: 14-FEB-2011

Status: APPTMD  APPOINTMENT MADE 

Description: Clinical Research Assistant

Detail

Date Opened: 14-FEB-2011  Date Closed: 03-MAR-2011 

Requested By: 

Vacancy Type: RE  Research

- a. Select the appropriate vacancy status e.g. *Appointment Made* or *No Appointment Made*.
 - b. Enter a date into the **Date Closed** field.
 - c. Select the **Closed** radial in the *Vacancy Status/Date* section of the screen. Do not use the *'Filled'* or *'Hold'* radial.
2. Click the  button.