



Web Recruitment Release 4, January 2015

Managing Vacancies and Applicants

HR Systems



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1. Introduction

1.1 Overview of recruitment-related systems and Web Recruitment Releases 1 - 3

The recruitment process begins with the identification and definition of a vacancy. This includes developing or updating the PD33 or role description and, for new academic-related and assistant staff vacancies, the grading of the post. Posts which are graded are set up in CHRIS (the HR and Payroll System) by the Grading team in the HR Division.

The new Recruitment Administration System (RAS) is then used to:

- Find the details of a vacancy which exists in CHRIS (posts which have been graded or are being refilled); or
- Enter the vacancy details for a new academic or research post (these are not individually graded so have not already been set up in CHRIS at this point).

Permission to fill a vacancy is then requested and granted in RAS.

In most cases, the vacancy should be advertised. Once all required permissions for a vacancy have been obtained, RAS can be used to place an advert on the University's Job Opportunities pages and to send to external media for publication.

In RAS, a department/institution records whether or not they will be inviting online job applications via the Web Recruitment System. Where the Web Recruitment System is to be used, RAS will:

- Insert an 'Apply online' button on the advert for the vacancy on the Job Opportunities pages;
- Insert a URL in external adverts for the vacancy, which routes to the relevant advert on Job Opportunities.

The Web Recruitment System can then be used to receive and process applications received.

The first release of the Web Recruitment System focused on:

- Allowing applicants to apply online via the University Job Opportunities pages;
- Automatically acknowledging applications;
- Allowing recruiters to view, email and print applications;
- Allowing recruiters/administrators to manage and record the results of the selection process; and
- Transferring the successful applicant(s) into the CHRIS Recruitment Module.

The second release of the Web Recruitment System focused on:

- Allowing applicants to copy personal details, qualifications and employment history from a previous application;
- Allowing recruiters to generate rejection emails and letters to applicants;
- Allowing recruiters to generate reference request emails and letters;
- Allowing referees to upload their reference into the system after a reference request email has been sent to them.

The third release of the Web Recruitment System focused on:

- Allowing recruiters to generate an email to the successful applicant where they need to provide information for a Tier 2 Certificate of Sponsorship;
- Allowing applicants to log back into their Web Recruitment account to enter the additional Tier 2 CoS information and upload supporting documents;
- Allowing recruiters to download the applicant details required for a Tier 2 CoS so that it can be attached to the rest of the CoS application for submission to HR;
- Automated marking of an application as eligible for purging 12 months after the vacancy closes (including extended deletion dates for those vacancies where CoS retention policies apply);
- Allowing super-users to mark a vacancy as a purging exception;
- Automated deletion of unsubmitted applications two months after the vacancy closing date;
- Retaining anonymised data for future trend analysis and management reporting;
- Allowing applicants to enter basic disclosure information when a vacancy has a basic disclosure check selected within new RAS;
- Generating reports of applicant information from within Web Recruitment and export results to Excel; and
- Adding bookmarks to the application pack PDF, allowing recruiters to navigate around more easily between applicants and documents.

1.2 Release 4 overview

Release 4 focuses on:

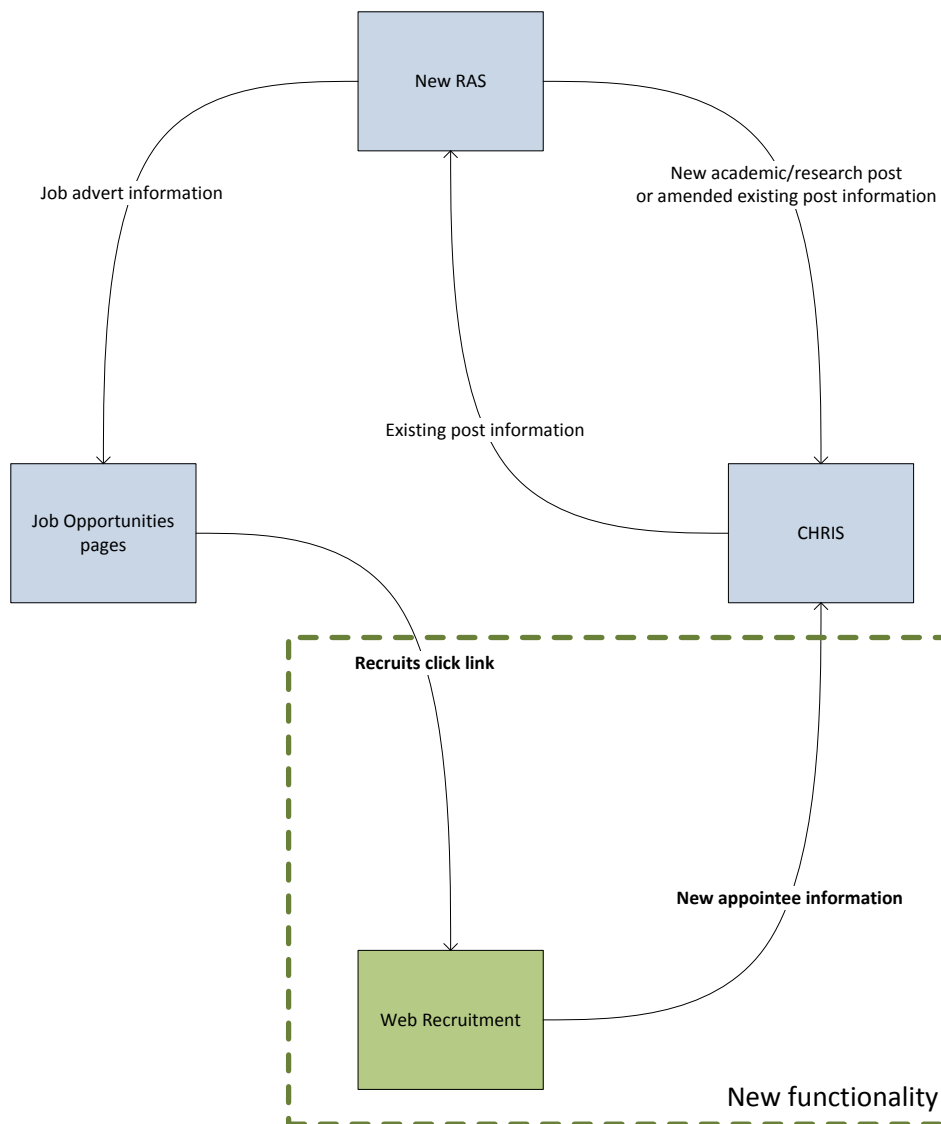
- Removing the need for vacancy administrators in departments/institutions to use the CHRIS Recruitment Module and CHRIS/10A form for the majority of appointments and replacing these with the following actions doing the following within Web Recruitment:
 - Recording details about the offer and appointment within a new Offers section;
 - Uploading supporting documents for an appointment (and Tier 2 Certificate of Sponsorship application, if required); and
 - Submitting an electronic Appointment Request to the HR New Appointment team.
- Pre-filling the Offers section with details about the applicant (from their online application form) and the position (from CHRIS);
- Allowing vacancy administrators to generate an offer letter to the successful candidate using details that they have entered into the system or upload an offer letter they have created outside of the system;
- Allowing vacancy administrators to download a cover sheet for any supporting documents being sent to the HR New Appointment Team outside of the system;
- Recording details of how and when offer letters were sent to the successful candidate;
- Storing and accessing offer letter history;
- Allowing the New Appointment Team to receive and view appointment requests online within a new HR Processing section of the system; and
- Allowing the New Appointments team to transfer details of the applicant and appointment into the CHRIS Recruitment Module.

Departments/institutions should request appointments via Web Recruitment wherever possible and the New Appointment team will transfer successful applicants to CHRIS using their screens within the system. The supporting documents cover sheet can then be downloaded and attached to supporting documents and returned to the HR New Appointment Team for processing.

1.3 HR system linkages

Diagram 1 below shows how the different HR systems link together in the recruitment process.

Diagram 1: HR systems linkages in the recruitment process



1.4 System support

Technical queries relating to the Web Recruitment System should be directed to the **CHRIS Helpdesk** by emailing chris.helpdesk@admin.cam.ac.uk. The New Appointment Team should be contacted for advice about making appointments via hnewappointmentteam@admin.cam.ac.uk.

2. Web Recruitment – Available Documentation

This manual (shaded in grey below) forms part of the wider set of documentation for Web Recruitment summarised in the table. These documents can be found on the HR Systems Web Pages (found at <http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/web-recruitment-system>), along with additional supporting information (including links to videos and release notifications).

Title	Document Type	Description
Guide for Selectors	User guide	A guide designed for selectors that describes the process of logging on to Web Recruitment, viewing and downloading application packs.
Managing Vacancies	User guide	This is the main user guide, which explains how to find vacancies in the system, grant other access, download application forms, record outcomes at each stage of selection and complete recruitment so that the appropriate retention policy is applied to the details of the vacancy.
Tier 2 Certificate of Sponsorship – Requesting Applicant Details	Quick reference	This is a two page pictorial overview of the end-to-end process for requesting information from a successful applicant for a Tier 2 Certificate of Sponsorship (CoS) application. It is intended for users who do not require the level of detail in the step-by-step instructions in the guide below.
Tier 2 Certificate of Sponsorship – Requesting Applicant Details	User guide	This guide provides detailed step-by-step instructions on how to request that a successful applicant logs back into their Web Recruitment account to provide information and supporting documents needed for a Tier 2 CoS application.
Generating Correspondence	User guide	This guide explains how to generate rejection emails/letters and reference request emails/letters within the system. It also details how to view references uploaded directly into the system by referees and how to upload references received by post/email.
Generating Reports	User guide	The Web Recruitment system provides standard vacancy reports for applicant and referee details (for example, for use in mail merges or for email lists). This document describes the standard reports and how to generate them. It also describes how to use the custom reporting tool built into the application.
Managing Offers	Quick reference	This is a two page pictorial overview of the end-to-end offer and appointment process. It is intended for users who do not require the level of detail provided by the step-by-step instructions in the user guide below.
Managing Offers	User guide	This guide describes the process of making an offer, generating an offer letter, recording offer outcomes and entering additional information so that an electronic appointment request can be made to the HR New Appointment team. This process replaces the need for departments/institutions to use the CHRIS Recruitment Module and CHRIS 10(A) form for most appointments. The guide also provides a summary of how to request Tier 2 CoS information; full details are in the CoS guide.
Overview of the Applicant Process	User guide	A guide for internal users of the Web Recruitment System that describes the process of making an online application from the applicant's perspective.
Applicant Frequently Asked Questions (FAQs)	FAQs	This document details common queries from applicants that have been reported through the CHRIS Helpdesk, in the applicant survey and to vacancy contacts within departments/institutions.
Administrator Frequently Asked Questions (FAQs)	FAQs	This document details common queries from recruiters, selectors and vacancy administrators reported through the CHRIS Helpdesk, in the department/institution benefits survey and system demonstrations.
Processing Appointment Requests	User guide	This guide is for the HR New Appointment team and describes how to find, check and process Appointment Requests from departments/institutions.



3. Setting Up Online Applications

To enable applicants for a vacancy to use the online application form, you need to take the following steps in new RAS:

1. Log on to new RAS and add/find a vacancy. The new RAS user guide can be found at:

<http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/recruitment-administration-system-ras>

2. Progress as per the normal new RAS process until you reach **Step 2 – Job Details**. Here, you will see a new section relating to the application form:

Application Form

Form Type
 CHRIS5 CHRIS6

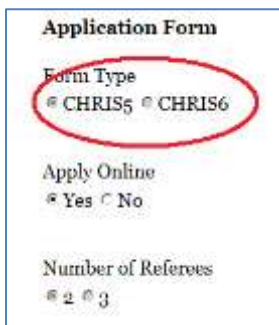
Apply Online
 Yes No

Number of Referees
 2 3

By default Apply Online will be set to ‘Yes’. If for some reason you do not want applications for the vacancy to be made via the new Web Recruitment system then click on the ‘No’ radio button.

The type of application form (CHRIS/5 Application for Employment or CHRIS/6 Cover Sheet for CVs) will be defaulted by RAS, in accordance with existing University policy (found at <http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning/determine-application-method>), as follows:

- Academic – CHRIS/6
- Research – CHRIS/6
- Assistant – CHRIS/5
- Academic-related – CHRIS/5 or CHRIS/6; you have the option of stating the required form for this type of vacancy.

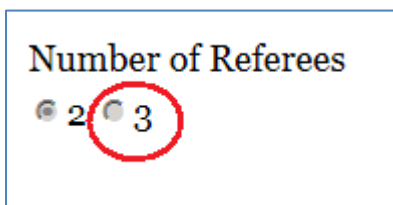


Click on the appropriate **Form Type**.



Please note: the Web Recruitment system will not allow applicants to add attachments a CHRIS/5 Application Form so they must not be asked to do so in job adverts. CHRIS/5 applications do not require attachments because all the details that any applicant would provide in a cover letter and CV are requested within the form. For example, the Suitability for the Role section should be used by an applicant to explain, using specific examples, how they meet the requirements for the role so a cover letter is unnecessary.

The number of referees for the vacancy will default to two. If you require the applicant to provide three referees then click on three:



An extra space for the third referee will be displayed within the on line application form.

3. New RAS will look at the screening checks you have selected for the vacancy on Step 2 – Job Details to determine which sections of the online application form should be displayed for your vacancy.

If you have selected any of the Disclosure and Barring Service (DBS) checks (or the position already has one selected and it remains applicable), whether essential before employment or not, then the Web Recruitment System will display a DBS section in the application form for applicants to complete information about any spent or unspent criminal convictions they may have.

If you have selected a basic disclosure (or the position already has this selected and it remains applicable), whether essential before employment or not, then the Web Recruitment System will display a basic disclosure section in the application form for applicants to complete details of any unspent criminal convictions they may have.

If you have selected a security check (or the position already has this selected and it remains applicable), whether essential before employment or not, then the Web Recruitment System will display a security section in the application form for applicants to complete.



Screening Checks ⓘ

NAME	ESSENTIAL BEFORE EMPLOYMENT
DBS Check	
<input style="width: 90%;" type="text" value="No DBS check"/>	<input type="checkbox"/>
<input type="checkbox"/> Disclosure and Barring Service (DBS) - Enhanced	<input type="checkbox"/>
<input type="checkbox"/> Disclosure and Barring Service (DBS) - Standard	<input type="checkbox"/>
<input type="checkbox"/> OH Medical Clearance	<input type="checkbox"/>
<input checked="" type="checkbox"/> Security	<input checked="" type="checkbox"/>
Clinical Checks	
Clinical School checks	
<input style="width: 90%;" type="text" value="No Research passport needed"/>	<input type="checkbox"/>
<input type="checkbox"/> Honorary Clinical Contract	<input type="checkbox"/>
<input type="checkbox"/> NMC Registration	<input type="checkbox"/>

4. In Step 5 – Advertisements, it is strongly recommended that you upload a HR7 Further Information document (formerly known as Further Particulars) to be displayed at the bottom of your University’s Job Opportunities pages advert. You do this by clicking on the **Add further information file** button before you add an advertisement.



Providing this information will ensure that prospective applicants have all the information they need to decide whether or not to apply for your vacancy. This file is also visible to referees to assist them in completing a suitable reference.

In addition, the HR7 Further Information template (<http://www.hr.admin.cam.ac.uk/forms/hr7-further-information-template>) contains a section which prompts you to inform applicants about:

- The online application process;
 - Up to 5 documents that you would like applicants to upload in their application (CHRIS/6 forms only) such as a CV, covering letter and research publication lists;
 - Who they should speak to if they have any questions about the vacancy.
5. When you preview your advert for a vacancy in RAS, you will be able to see wording which will be auto-inserted for you to direct applicants to:
- Click on the **Apply online** button (which will be inserted onto your Job Opportunities advert); or
 - Click on a link to the Job Opportunities advert (which will be inserted into adverts in external media to route applicants to where they can find the Apply button):

The auto-inserted wording about how to apply online means that you do not need to include information in your advert about the application process. However, please ensure that you do provide details of the person applicants may contact if they have a question about the vacancy or selection process.

Library Invigilator test (Maternity Cover)

Department/Location: University Library, Cambridge

Reference: VE02153


Closing date: 29 November 2013

Intereting and varied position

Maternity cover: This post is fixed-term until 31 January 2014 or the return of the post holder, whichever is the earlier.

Once an offer of employment has been accepted, the successful candidate will be required to undergo a health assessment.

To apply online or view further information please visit:
<http://dev.jobs.internal.admin.cam.ac.uk/job/2492>

 **Note:** Once you have written your advert(s), it is essential that you set up the University Job Opportunities pages as a published media type in the Media Bookings section of new RAS. Without this, there will be no way for applicants to access the Apply button that they will need to click on to be routed to the Web Recruitment System and the online application form.

Media bookings			
MEDIA/PUBLICATION	DATE SENT	STATE	
University Job Opportunities		Not published	Publish Preview Edit Remove
Add media			

All other steps in new RAS not described here should be completed in the normal way. Please see the new RAS User Manual for further details. This can be found on the HR Systems Landing pages at:


<http://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/recruitment-administration-system-ras>


An Overview of the Applicant Process document has been created to provide a summary of how the online application works from the applicant’s perspective. This document is found on the [HR Systems web pages](#).

4. Logging In and Locating a Vacancy or an Applicant

4.1 Logging in to Web Recruitment

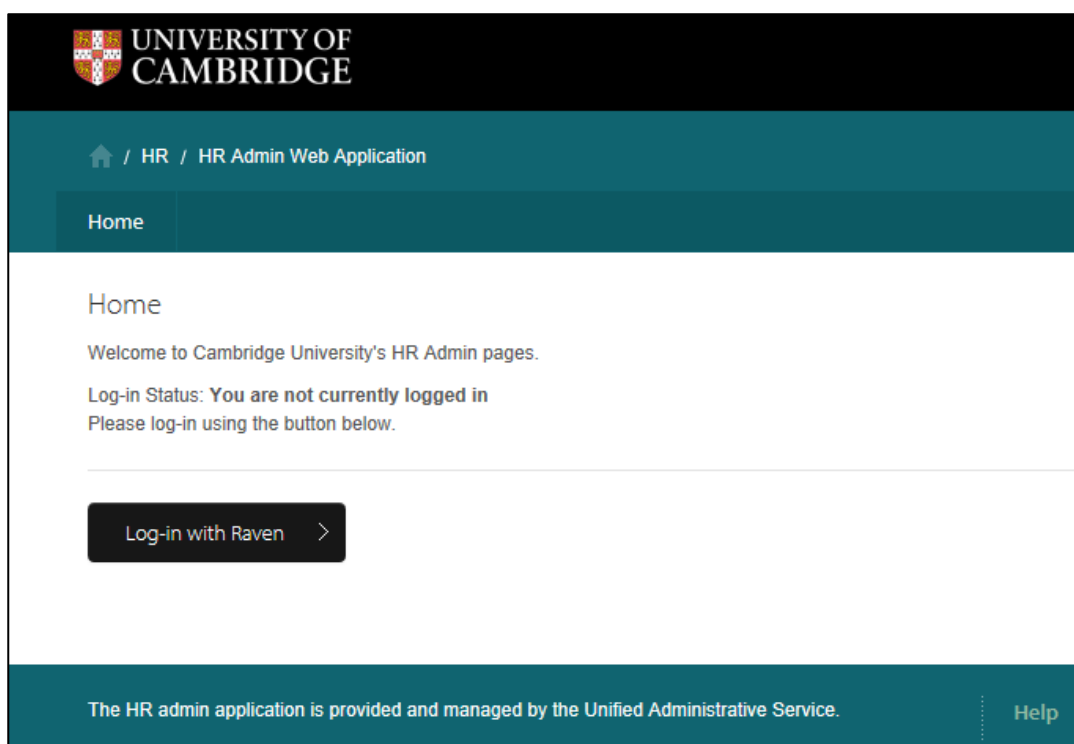
Use your Internet browser to go to <https://hrsystems.admin.cam.ac.uk/hr-admin-ui/>

 Tip: For future use, you may like to add the above link to your **favourites** in your browser or create a **shortcut** on your desktop.

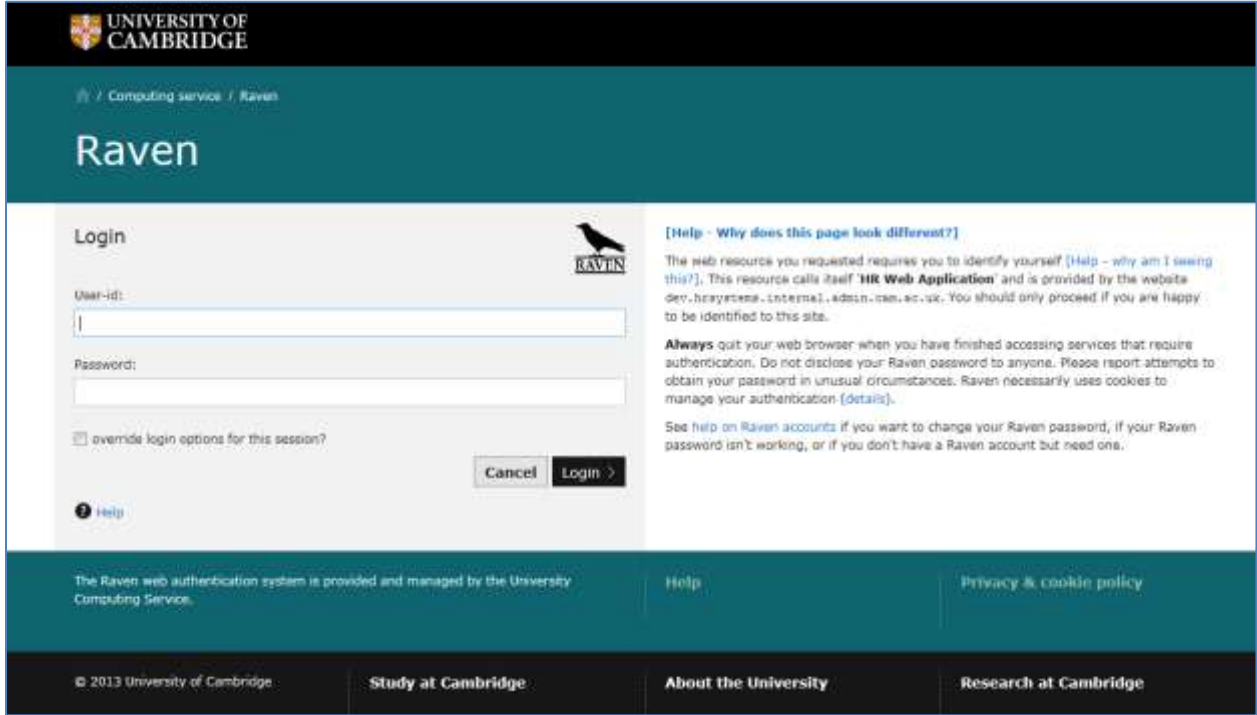
 Tip: The system can also be found on the HR Systems landing pages at:

<http://www.hrsystems.admin.cam.ac.uk/>

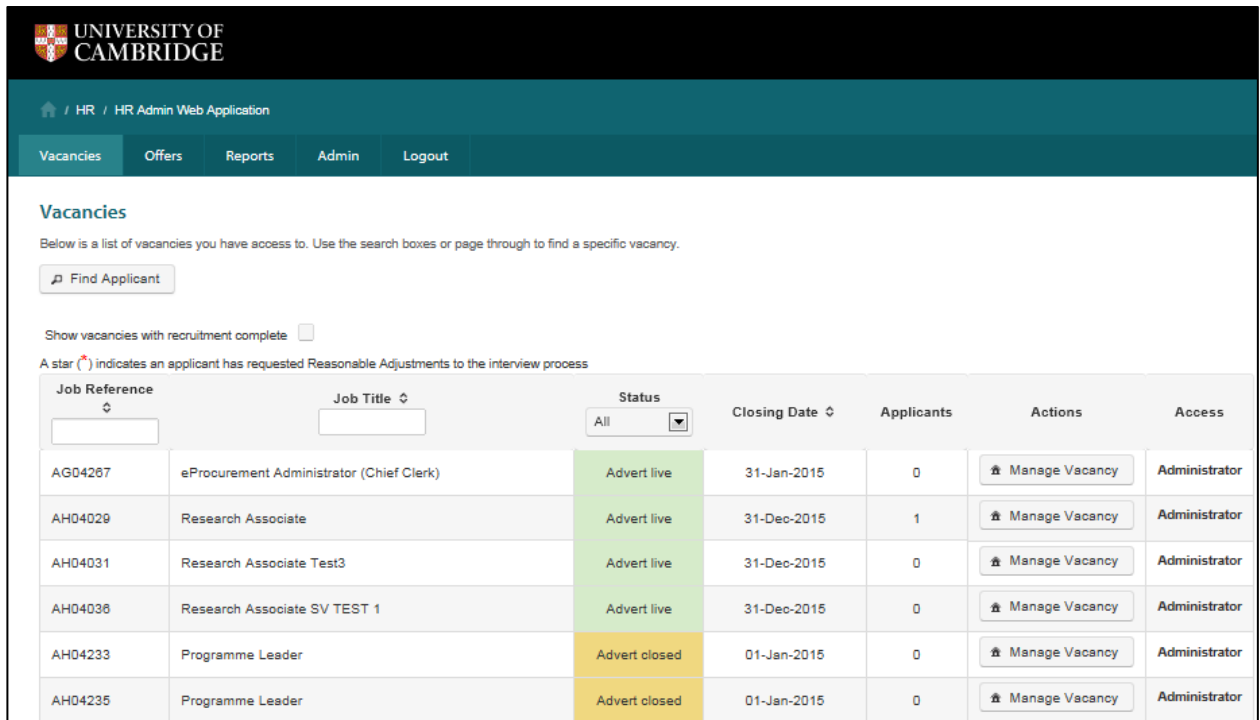
1. The screen below will be displayed. Click on the link **Log-in with Raven** button to access the system.



2. Enter your Raven user-id and password.



The system will then use your Raven user-id to identify which vacancies should be displayed to you.





4.2 How to search for a vacancy in Web Recruitment

4.2.1 Search Option 1 – By status

1. Log in to the Web Recruitment System. The **Vacancies** Tab will display all the vacancies that you have access to.

UNIVERSITY OF CAMBRIDGE

HR / HR Admin Web Application

Vacancies Offers Reports Admin Logout

Vacancies

Below is a list of vacancies you have access to. Use the search boxes or page through to find a specific vacancy.

Find Applicant

Show vacancies with recruitment complete

A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AG04267	eProcurement Administrator (Chief Clerk)	Advert live	31-Jan-2015	0	Manage Vacancy	Administrator
AH04029	Research Associate	Advert live	31-Dec-2015	1	Manage Vacancy	Administrator
AH04031	Research Associate Test3	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04036	Research Associate SV TEST 1	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04233	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04235	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator

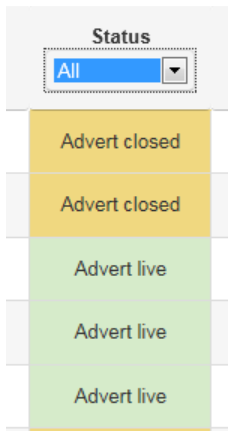
2. By default all incomplete vacancies (i.e. those where the advert is still live and those where the selection/offer process is still in progress) are displayed.

You can display Completed Vacancies by ticking the box.

Show vacancies with recruitment complete

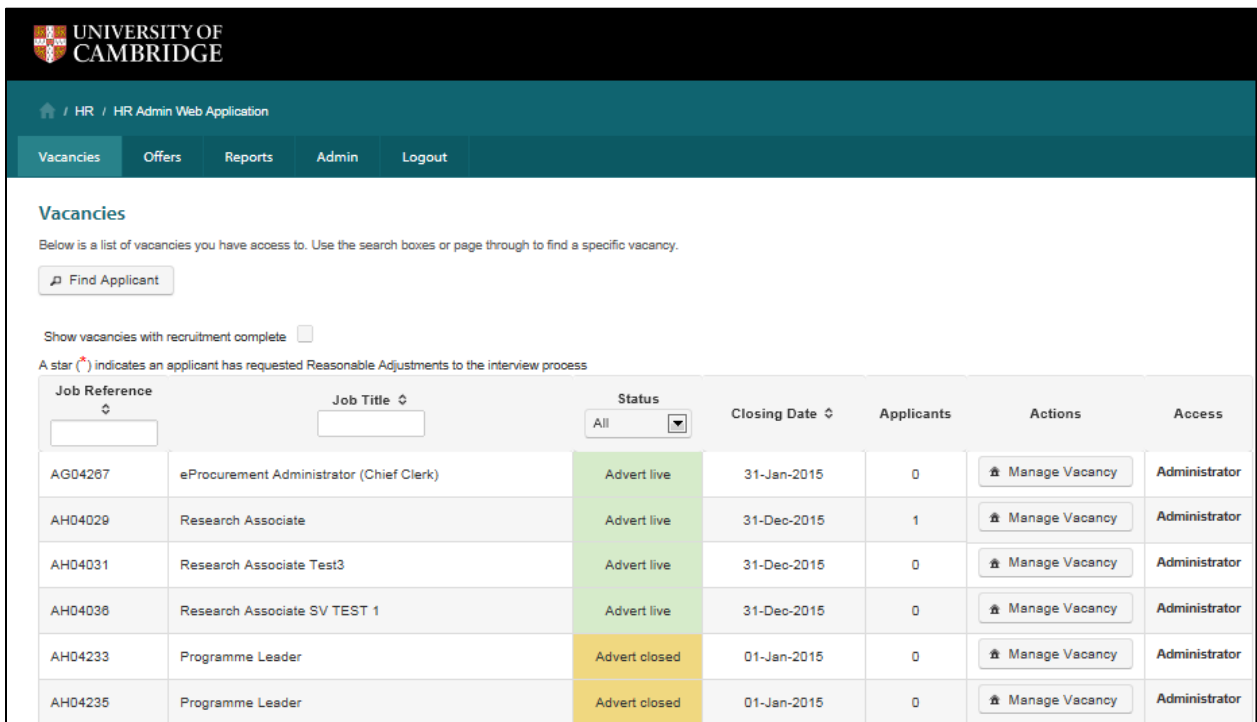
Please see the section on [completing recruitment](#) for further details.

3. You can also choose to display only vacancies where the advert (and therefore online applications) has closed or where the advert is still live by selecting from the drop-down menu in the **Status** column.



4.2.2 Search Option 2 – Using the filters

Log in to the Web Recruitment System. The **Vacancies** Tab will display all the vacancies that you have access to.



UNIVERSITY OF CAMBRIDGE

HR / HR Admin Web Application

Vacancies Offers Reports Admin Logout

Vacancies

Below is a list of vacancies you have access to. Use the search boxes or page through to find a specific vacancy.

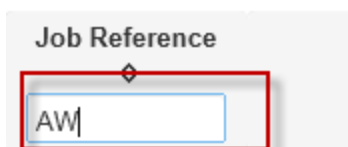
Find Applicant

Show vacancies with recruitment complete

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Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AG04267	eProcurement Administrator (Chief Clerk)	Advert live	31-Jan-2015	0	Manage Vacancy	Administrator
AH04029	Research Associate	Advert live	31-Dec-2015	1	Manage Vacancy	Administrator
AH04031	Research Associate Test3	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04036	Research Associate SV TEST 1	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04233	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04235	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator

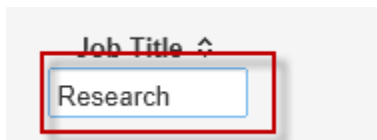
At the top of the **Job Reference** column you will see a white search box. Enter data into this box to search for specific details on a vacancy.



There is no need to press enter on your keyboard when using the filters; just type into the field and the screen will filter automatically to provide a list all the data that meets your search criteria.

Job Reference ⌵	Job Title ⌵	Status ⌵	Closing Date ⌵	Applicants
<input type="text" value="AW"/>	<input type="text"/>	All <input type="button" value="v"/>		
AW02219	Research Associate	Open	11-Apr-2014	30*
AW02231	UAS - 26	Open	12-Apr-2014	31*
AW02247	Assistant to Stu	Open	12-Apr-2014	30*
AW02269	Research Associate	Open	11-Apr-2014	30*
AW02283	UAS - 26	Open	12-Apr-2014	30*

At the top of the **Job Title** column you will also see a white search box. Enter data into this box (without pressing ‘Enter’ on your keyboard) to search for specific details on a vacancy.

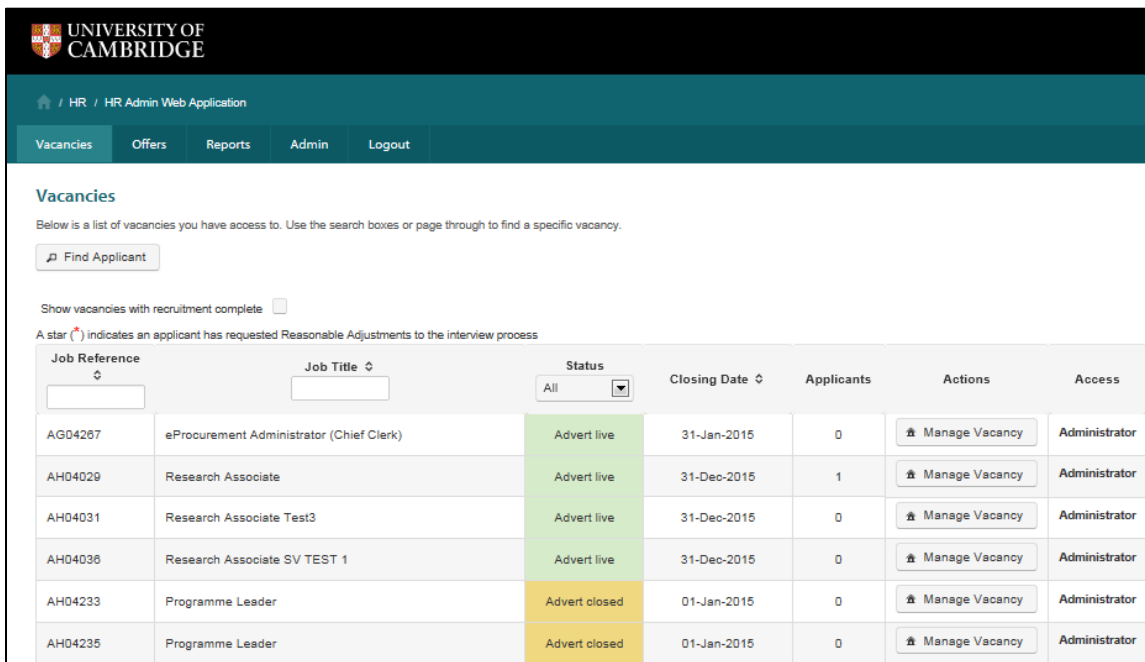


You see the screen filter automatically to provide a list all the data that meets your current search criteria.

Job Reference ⌵	Job Title ⌵	Status ⌵	Closing Date ⌵	Applicants
<input type="text"/>	<input type="text" value="Research"/>	All <input type="button" value="v"/>		
AK02161	Research Assistant	Open	11-Apr-2014	30*
AM02263	Research Assistant	Open	11-Apr-2014	30*
AR02217	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02229	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02241	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02245	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02266	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02281	Research Fellow UAS - 23	Open	12-Apr-2014	0

4.3 How to search for an applicant in Web Recruitment

1. Log in to the Web Recruitment System. The **Vacancies** Tab will display all the vacancies that you have access to.



Vacancies

Below is a list of vacancies you have access to. Use the search boxes or page through to find a specific vacancy.

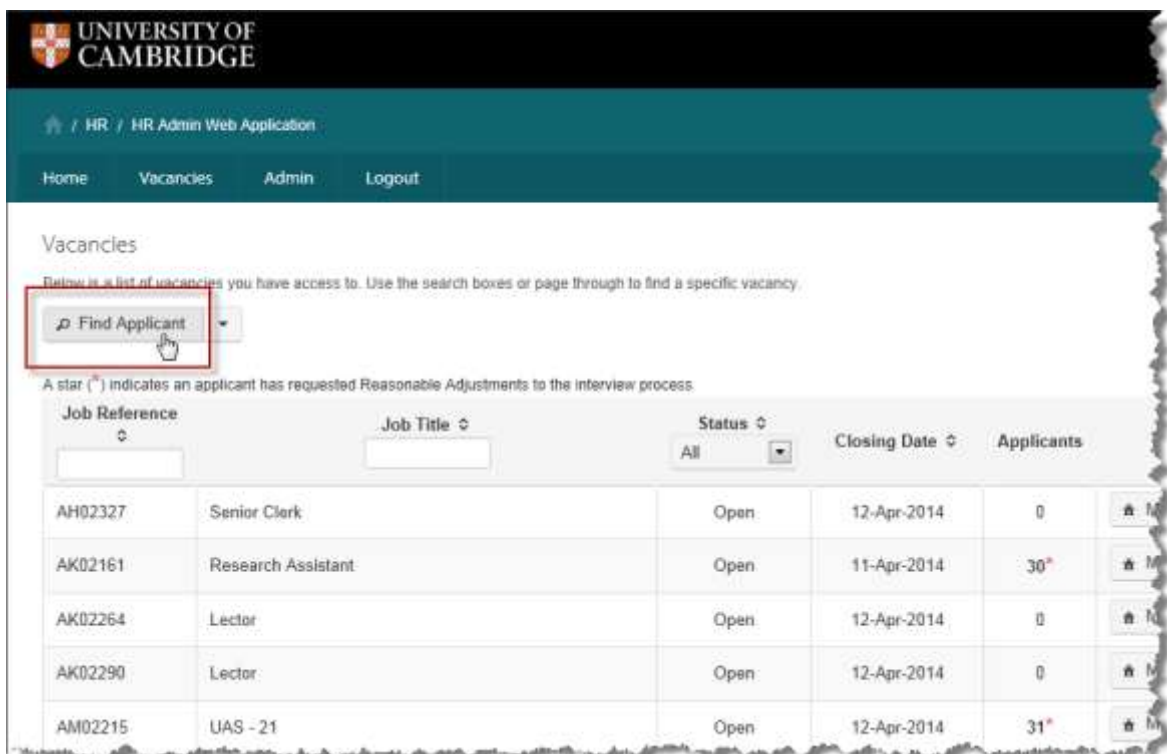
[Find Applicant](#)

Show vacancies with recruitment complete

A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AG04267	eProcurement Administrator (Chief Clerk)	Advert live	31-Jan-2015	0	Manage Vacancy	Administrator
AH04029	Research Associate	Advert live	31-Dec-2015	1	Manage Vacancy	Administrator
AH04031	Research Associate Test3	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04036	Research Associate SV TEST 1	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04233	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04235	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator

2. Click the **Find Applicant** button at the top left of the page



Vacancies

Below is a list of vacancies you have access to. Use the search boxes or page through to find a specific vacancy.

[Find Applicant](#)

A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AH02327	Senior Clerk	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AK02161	Research Assistant	Open	11-Apr-2014	30*	Manage Vacancy	Administrator
AK02264	Lector	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AK02290	Lector	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AM02215	UAS - 21	Open	12-Apr-2014	31*	Manage Vacancy	Administrator

- The **Find Applicants** window will be displayed. This will allow you to search for an applicant across all your vacancies by entering certain data, for example Forename, Surname, Date of Birth. Enter the data you wish to sort by and then click on the **Search for Applicant** button.

Find Applicants

Use this window to search for an applicant across all of the vacancies to which you have access. Clicking on an applicant will navigate to the corresponding vacancy.

Search results are limited to the first 50 applicants found

Forename: Surname:

Date of Birth: NI Number:

Vacancy Ref: Vacancy Title:

[Search for Applicant](#)

- The results of your search will be displayed.

Applicant Name	Vacancy	Info
Brown, Donald	AW02269: Research Associate	i
Brown, Louise	AW02269: Research Associate	i

- You can click on the ‘i’ icon under the Info column to review the submitted date, stage and status details of their application.

iate [i](#)

Full Name: Brown, Amber

Submitted Date: 12-Feb-2014 15:23:26

Stage: Application Received

Status: Active

5 Managing vacancies

5.1 Introduction

If you are listed in RAS as the recruiter for the vacancy (i.e. if you were the person that requested permission to fill in RAS) then, initially, you will be the only person with the ability to access that vacancy. You will have **Administrator** access, which means that you can view and process applications.

Additional access of different levels can be added using the **Permissions** function. See the section on this topic for more [details](#).

The vacancy list displays all the vacancies to which you have any form of access rights. The type of access you have will be shown in the right hand side of the table.

Vacancies

Below is a list of vacancies you have access to. Use the search boxes or page through to find a specific vacancy.

Show vacancies with recruitment complete

A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AG04267	eProcurement Administrator (Chief Clerk)	Advert live	31-Jan-2015	0	<input type="button" value="Manage Vacancy"/>	Administrator
AH04029	Research Associate	Advert live	31-Dec-2015	1	<input type="button" value="Manage Vacancy"/>	Administrator
AH04031	Research Associate Test3	Advert live	31-Dec-2015	0	<input type="button" value="Manage Vacancy"/>	Administrator
AH04036	Research Associate SV TEST 1	Advert live	31-Dec-2015	0	<input type="button" value="Manage Vacancy"/>	Administrator

All vacancies that have not been marked as **Recruitment Complete** will not be displayed, unless you check the box to see these:

Show vacancies with recruitment complete

Please see the section on [completing recruitment](#) for further details.

You can also change the status to display only those vacancies where there is an **Advert live** (i.e. the closing date for applications has not yet passed) or vacancies with an **Advert closed** (i.e. the closing date for applications has passed).

Status

- All
- Advert live
- Advert closed

To look at the history of filled vacancies (for example, to review the recruitment process the last time the job was advertised) then you can use the **Job Reference** and **Job Title** search boxes, or sort your

vacancies based on **Closing Date**. Remember to tick the **Show vacancies with recruitment complete** box, as required.



Note: To facilitate compliance with the University's existing [retention policy for recruitment documentation](#), un-successful candidate data older than 12 months will be deleted from the system automatically, unless the successful candidate requires a Tier 2 Certificate of Sponsorship. This is because UK Visas and Immigration (UKVI) requires us to retain recruitment documents for 12 months or until a UKVI compliance officer has examined and approved them, whichever is the longer period.

Anonymised candidate information will also be retained for the purposes of equal opportunities trend analysis. In exceptional circumstances (e.g. because of ongoing legal proceedings), you must contact your HR Business Manager or the Head of Recruitment to agree that recruitment data may be kept for longer than the standard period. Once this has been agreed, the CHRIS Helpdesk will need to be instructed to add an exception flag to the vacancy along with a reason to prevent the data being deleted according to the normal purging schedule.

Once you have identified the vacancy you wish to view/manage, you can choose to give others access to the vacancy.

5.2 Giving others access to a vacancy

5.2.1 Introduction – Web Recruitment roles explained

The ability to access a vacancy in Web Recruitment is granted on a vacancy by vacancy basis.

Initially, when the vacancy is imported from RAS, there will be a single **administrator** (admin) user granted access automatically: the RAS user for the vacancy. This person will be responsible for assigning user roles to others as required. People without a Raven password, such as people external to the University, cannot be granted system access. Any external members of appointing bodies will need to be emailed an application pack or provided with hard copies (please see section on [emailing an applicant pack](#) for details).

There are three different user roles for a vacancy that you can assign to anyone with a raven password. These are documented in the table below:

Role	Available actions
READ:	Has the ability to: <ul style="list-style-type: none"> • View applications and see what stage and status they are. • View documents uploaded to the vacancy and applicant records. • View all pending and completed correspondence. • View at vacancy level whether any of the applicants have requested reasonable adjustments (but not which applicant). • Create an applicant/ referee report. • Report on a vacancy. • Generate an HR11 selection grid. • View offers for a vacancy.
WRITE:	Same as above plus can: <ul style="list-style-type: none"> • Change an applicant stage/status. • Add notes to an application via the notes window (pending). • Upload documentation to the vacancy and application. • Configure a vacancy. • Customise rejections and send rejection emails. • Re-activate rejected candidates. • Switch correspondence to manual. • Download pdf rejection and reference documents. • Preview, confirm or cancel a pending task. • Request a reference. • Manually upload a reference.
ADMIN:	Same as above plus can: <ul style="list-style-type: none"> • Add, edit and remove manual applicants. • Edit an applicant. • Give others access to the vacancy by assigning one of the three user roles to them. • See at applicant level which applicants have requested reasonable adjustments. • View reasonable adjustments requested, in the Notes field for an applicant. • Complete recruitment on a vacancy. • Complete offer details and submit an Appointment Request to the New Appointment Team. • Record that a CoS is required and request CoS details. • View a CoS report. • Cancel the CoS process.



Please note that:

- Functionality for making an Offer is restricted to ADMIN users;
- The process for transferring the successful applicant to the CHRIS Recruitment Module is no longer available to ADMIN users as this is now managed by the New Appointment Team;
- The CoS request function is now an integral part of the Offer process and hence the ability to request a CoS is only available to ADMIN role users; and

- WRITE users can also now perform vacancy configuration for correspondence.

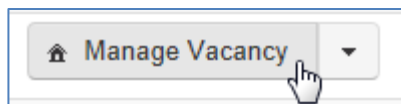
There are also four roles that can be applied to a user to give them system-wide permissions. These access levels can only be granted by a SUPER-USER, normally the MISD systems administrator or the CHRIS Helpdesk. They are designed for use by central HR teams and technical development and support.

Role	Available actions
NEW_APPOINTMENTS:	Has the ability to receive new appointment requests for all areas, to view the applicant pack, the offer details, the CoS details and the appointment request form. Has the ability to transfer the successful candidate from the Web Recruitment System into CHRIS ready for further processing and appointment. Can also view the transfer status and investigate or dismiss any errors.
SUPER-USER:	Has ADMIN level permission to all vacancies in the system, including the ability to change the retention policy for a vacancy.
SUPER-READ-ONLY:	Has READ level permission to all vacancies in the system.
REPORTER:	Used by reporting system. Will have an associated list of organisational units on which they can report using Discoverer.

5.2.2 Assigning Access Rights

To grant other access to a vacancy you are administering:

1. Click on the **Manage Vacancy** button next to the vacancy.



2. The **Vacancy Overview** screen will be displayed. Select **Permissions**.

Vacancy Overview
AH04029: Research Associate

Applicants

Process Applicants (8)

Manage Manual Applicants (0)

Vacancy Configuration

Tasks

Manage Rejection Correspondence

Manage Reference Requests

Manage CoS Requests (2)

Correspondence

Awaiting Confirmation (0)

Completed and Others (0)

View or Record Correspondence

Permissions

Notes (0)

Attachments (0)

Vacancy overview

Welcome to the vacancy management area, from here you are able to:

- View and manage applications to this vacancy
- Handle rejection communications and reference requests
- Manage vacancy permissions
- View and confirm tasks relating to this vacancy
- Maintain vacancy notes and attachments

Applicant & referee report

Download an Excel workbook containing three worksheets: an applicant contact details list, a referee contact details list, and an applicant list without contact details.

[Applicant & referee report](#)


Positions available for this vacancy

The following positions can be appointed for this vacancy. If there are no positions listed, and it has been of least 24 hours since you set up this vacancy on RAS, please contact the CHRIS Helpdesk.

	Offer in progress?	Earliest start date
7902897: Research Associate	Orlath Cooper	12-Aug-2014

[Application Stages](#) [Media](#)

Application Stages Overview



The **Vacancy Permissions** screen will be displayed:

Vacancy Permissions

Use this form to allow other people to view / edit this vacancy and its applicants. The roles available are listed in the [Applicant Guidance](#)

- + Add new user adds a new user
- - Remove removes a user
- Always click **Save permissions** to save your changes

CRS ID	Role	Remove
<input type="text" value="av404"/>	READ	- Remove
<input type="text" value="pab61"/>	READ	- Remove
<input type="text" value="nmm31"/>	READ	- Remove
<input type="text" value="pam26"/>	ADMIN	- Remove
<input type="text" value="pg348"/>	READ	- Remove
<input type="text" value="kmja2"/>	READ	- Remove
<input type="text" value="mpc52"/>	READ	- Remove
<input type="text" value="jmg1004"/>	READ	- Remove
<input type="text" value="ses42"/>	READ	- Remove

(1 of 1) |< << 1 >> >|

+ Add new user Save permissions

3. Click on the 'Add new user' button.

<input type="text" value="jmg1004"/>	READ	- Remove
<input type="text" value="ses42"/>	READ	- Remove

(1 of 1) |< << 1 >> >|

+ Add new user Save permissions

A new row will appear as shown below.

jmg1004	READ	- Remove
ses42	READ	- Remove
	READ	- Remove
(1 of 1) < << 1 >> >>		
<input type="button" value="+ Add new user"/> <input type="button" value="Save permissions"/>		

4. Add the CRS-ID (e.g. aa999) for the person you wish to give access to the vacancy and select a user role for the person.

Role

READ	▼
READ	
WRITE	
ADMIN	


Roles within the Web Recruitment System are explained at the [start of this section](#).


5. Click on **Save permissions**, or click on the **Add new user** button again to add an additional user.


jmg1004	READ	- Remove
ses42	READ	- Remove
mg666	WRITE	- Remove
(1 of 1) < << 1 >> >>		
<input type="button" value="+ Add new user"/> <input style="border: 2px solid red;" type="button" value="Save permissions"/>		



Note: The CRS-ID is being checked against the CHRIS system to identify the email address for the user. If there is not email address in CHRIS you will need to get the user to contact the CHRIS Helpdesk to resolve this before you can add them. Only the CRS-ID is shown (not the name) so please ensure that it is accurate otherwise the person you have selected will not be able to see the vacancy in the Web Recruitment System.

 Note: A single person may have multiple CRS-IDs. You will need to ensure that you enter the ID that the person wishes to use to log on to Web Recruitment.

 Note: It is inadvisable to allow large numbers of ADMIN roles on one vacancy. This could lead to confusion, for example, if one administrator has generated correspondence and another updates the contact details before the letters have been sent. ADMIN users also have the ability to add further ADMIN access and granting this level of access should be considered carefully so as to avoid unexpected cascade effects.

 Tip: If you have added someone incorrectly then just click on the **Remove** button to delete their access to this vacancy.




5.3 Storing recruitment documents and notes against a vacancy

5.3.1 Uploading and storing vacancy documents

You may find it helpful to store documents relating to the recruitment process for a vacancy within the system so that you have everything saved in one place. For example, you may like to upload the following documents for a vacancy:

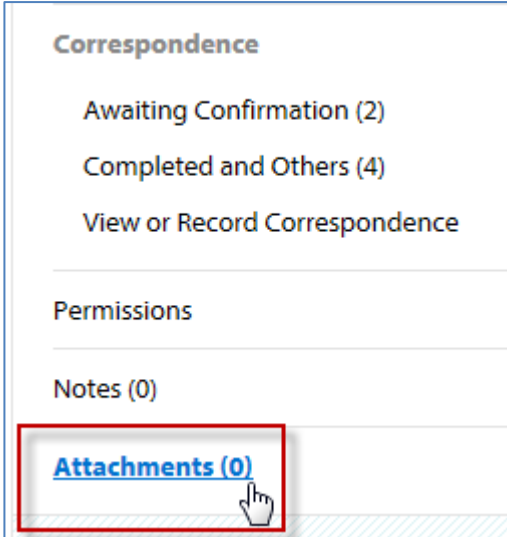
- HR7 Further Information template (<http://www.hr.admin.cam.ac.uk/forms/hr7-further-information-template>);
- HR6 Selection Criteria template (<http://www.hr.admin.cam.ac.uk/forms/hr6-selection-criteria-template>);
- HR11 Selection Results Grid (<http://www.hr.admin.cam.ac.uk/forms/hr11-selection-results-grid>);
- HR15 Selection Process Schedule (<http://www.hr.admin.cam.ac.uk/forms/hr15-selection-process-schedule>).

 Tip: Store documents against a vacancy if they relate to the job, the recruitment process or multiple applicants. [Store documents against an applicant](#) if they relate to one applicant only.

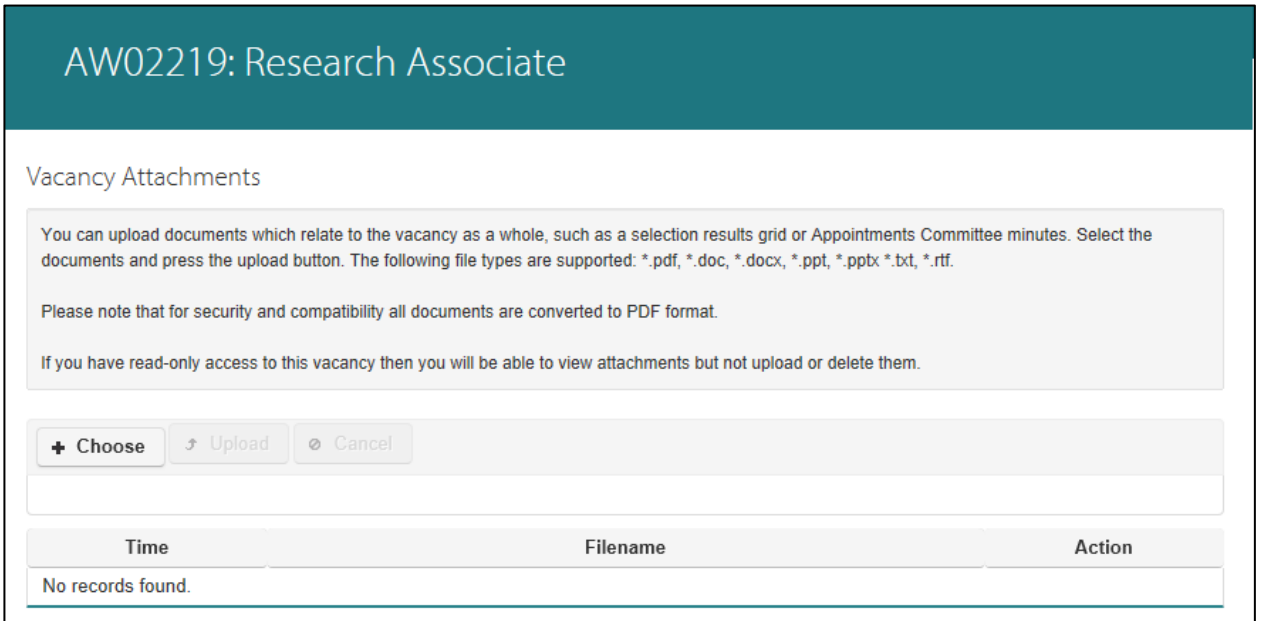
Please note: under Data Protection legislation, all applicants are entitled to make a subject access request to see all personal data held on them, including documentation from the recruitment process. Therefore, it is vital that any recruitment documentation stored within the system or elsewhere) contains appropriate information which demonstrates that a fair, objective process took place. It is strongly advised that you complete the University's online training on data protection (<http://www.training.cam.ac.uk/cppd/event/1208963>) if you have not done so already and you are going to have WRITE or ADMIN access in Web Recruitment.

To upload such documents to a vacancy that you are administering:

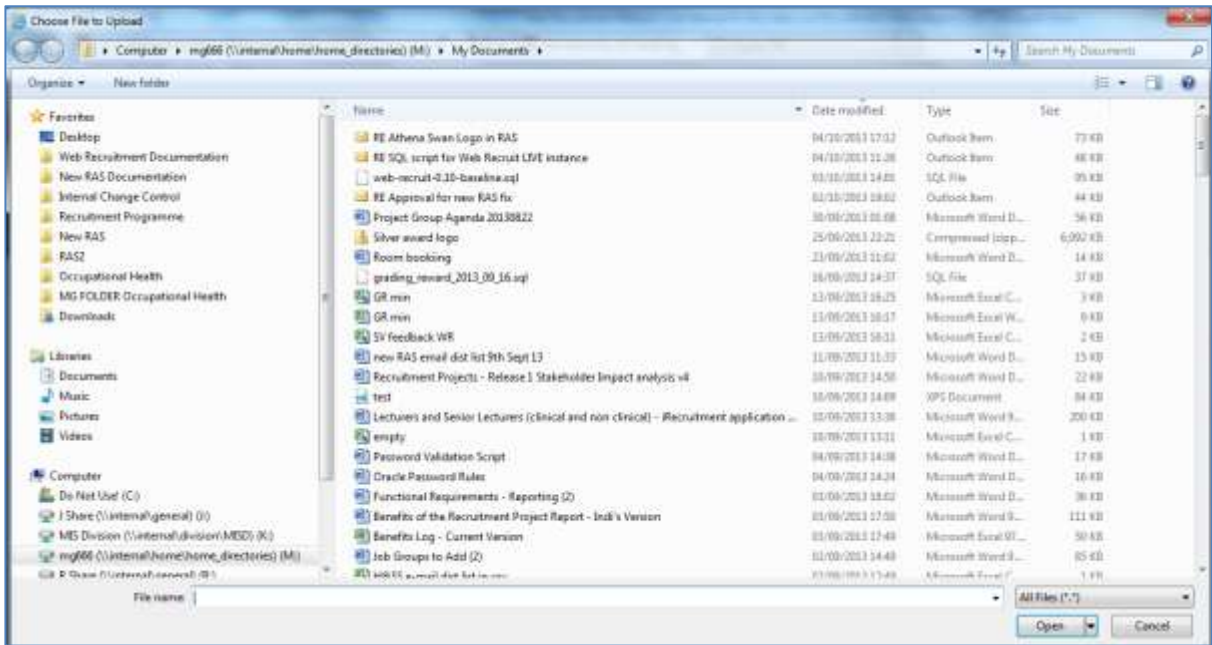
1. Click on the **Attachments** option.



The **Vacancy Attachments** screen will be displayed. This includes information about the types of file that can be uploaded.



2. Click on **Choose**. Your file directory will then be displayed.

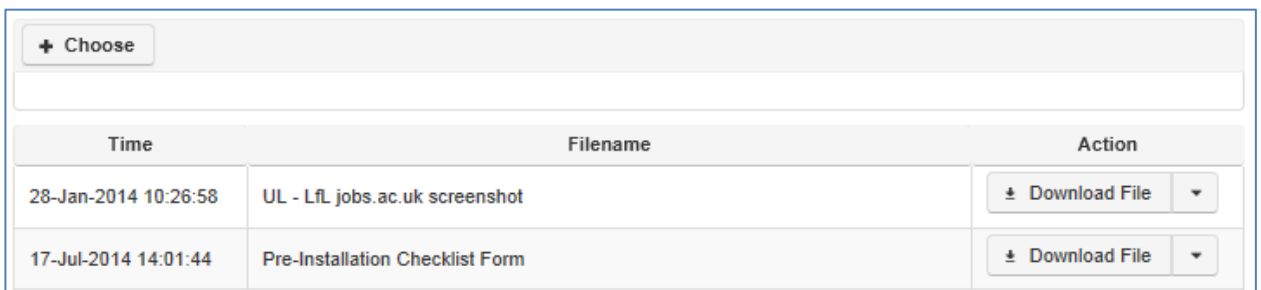


3. Select a file to be uploaded and click on **Open**.

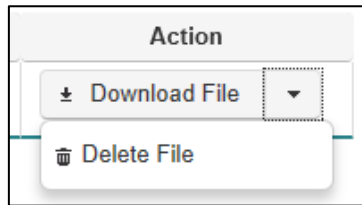
The file name will be displayed on screen.



The document will then be uploaded. The time and file name will be displayed as shown below.



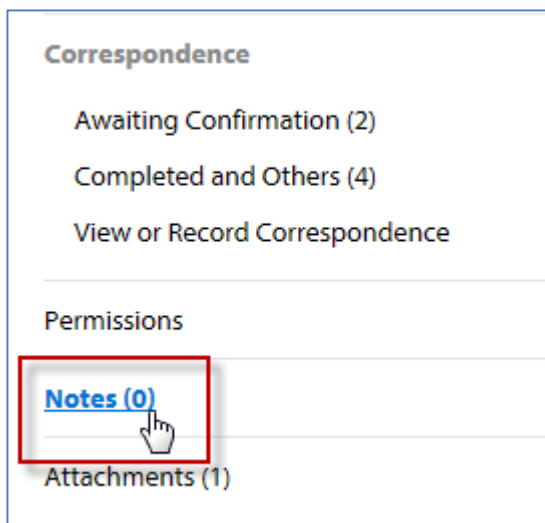
Tip: To check the file content, click the **Download File** button in the action field. To delete the document, select the **Delete File** option in the action field.



5.3.2 Recording vacancy notes

You are able to add notes against a vacancy, which provide an auditable trail of information. You may wish to use this function to record that key events have taken place in the process, particularly where there is more than one person providing administrative support for a vacancy. For example, you may wish to record the date that short-listing will be completed by the Appointing Body, that you have sent invite to interview letters out or that you have booked a particular room for interviews. Information about individuals should not be recorded here - you can also add notes to individual applicants (see the section on [adding notes](#) to an applicant's record).

1. Click on the **Notes** option.



The **Vacancy Notes** screen will be displayed.



Vacancy Notes

These notes provide a history of the vacancy - they are an auditable trail and can be used to note interviews or other relevant information. You can also add notes to individual applicants. You should not include personal information about any individual applicant in these vacancy notes.

You can also add notes to individual applicants. You should not include personal information about any individual applicant in these vacancy notes.

If you have read-only access to this vacancy then you will be able to view notes but not add or edit them.

New Note (930 characters remaining)

Interviews will be held on 1st August. Room F25 booked 14:00 to 16:00

+ Add Note

2. Enter your note in the **New Note** text box.

Vacancy Notes

These notes provide a history of the vacancy - they are an auditable trail and can be used to note interviews or other relevant information. You can also add notes to individual applicants. You should not include personal information about any individual applicant in these vacancy notes.

You can also add notes to individual applicants. You should not include personal information about any individual applicant in these vacancy notes.

If you have read-only access to this vacancy then you will be able to view notes but not add or edit them.

New Note (930 characters remaining)

Interviews will be held on 1st August. Room F25 booked 14:00 to 16:00

+ Add Note

Date	Added by	Note
17-Jul-2014 14:03:35	mg666	the interview are scheduled for Monday

3. Click on **Add Note**. The details of your note, the date it was added and your CRS-ID will appear in the table underneath.

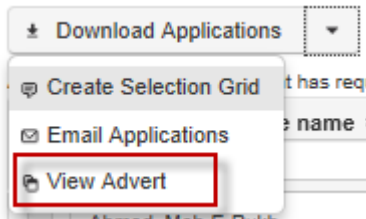
New Note (1000 characters remaining)

Date	Added by	Note
13-Mar-2014 17:40:07	het27	Interviews will be held on 03/04/14. Room F59 booked 12:00 - 16:00

^ Add Note

5.4 Viewing the advert/further information for the vacancy

1. If you want to remind yourself of the advert details when reviewing applicants, you can click on the **View Advert** option from the drop-down menu.



This will display the text from the University Job Opportunities advert for the vacancy.

AM02263 Research Assistant

Job ref : AM02263
Post Title : Assistant post
Title : UAS - 21 (Maternity Cover)
Org Unit : Pensions Section, Bedford
Category : Assistant staff
Max Salary : £15,658-£18,005
Published : 16-Dec-2013
End date : 12-Apr-2014

Maternity cover: This post is fixed-term for 3 months or the return of the post holder, whichever is the earliest.

Once an offer of employment has been accepted, the successful candidate will be required to undergo DBS (DBS) and a security check.

To apply online for this vacancy, please click on the 'Apply' button below. This will route you to the University website where you will need to register an account (if you have not already) and log in before completing the online application.

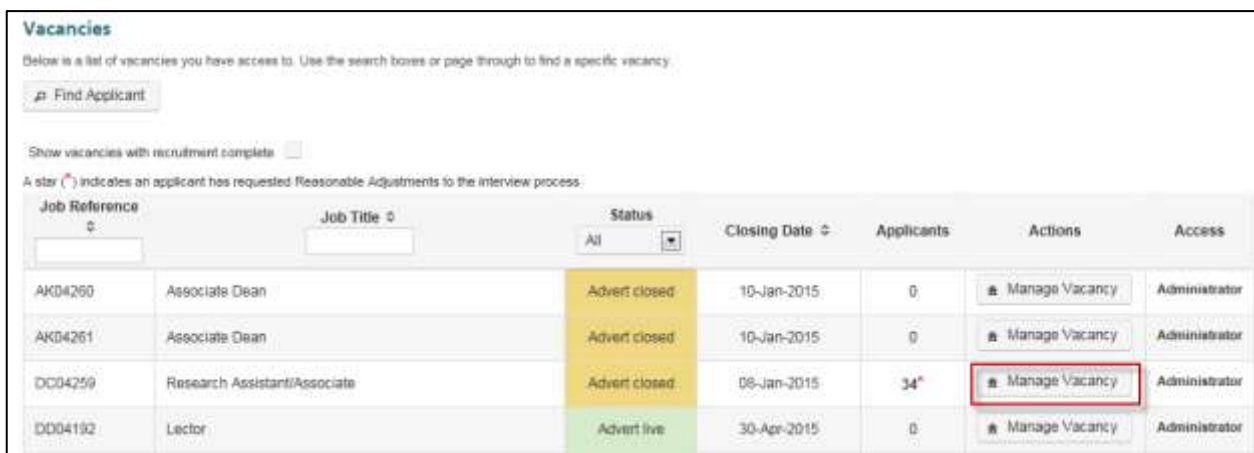
The HR7 Further Information document (if published with the advert on Job Opportunities) is also shown underneath the advert.

4. Managing Applicants Through the Selection Process

6.1 Introduction

Applicants can be managed through the stages of the selection process, and actions undertaken in relation to applicants, by making use of the facilities within the **Process Applicants** screen.

1. From the main vacancy listing screen, select the vacancy you wish to process and click on **Manage Vacancy** button.



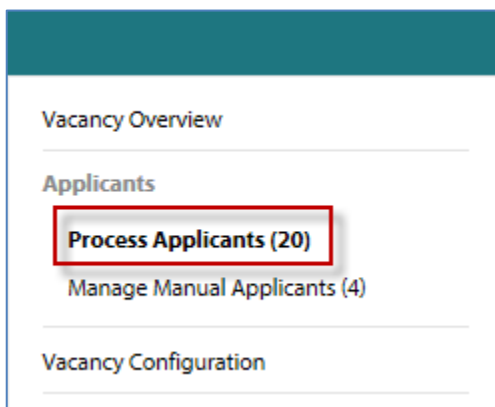
Vacancies
Below is a list of vacancies you have access to. Use the search boxes or page through to find a specific vacancy.

Show vacancies with recruitment complete

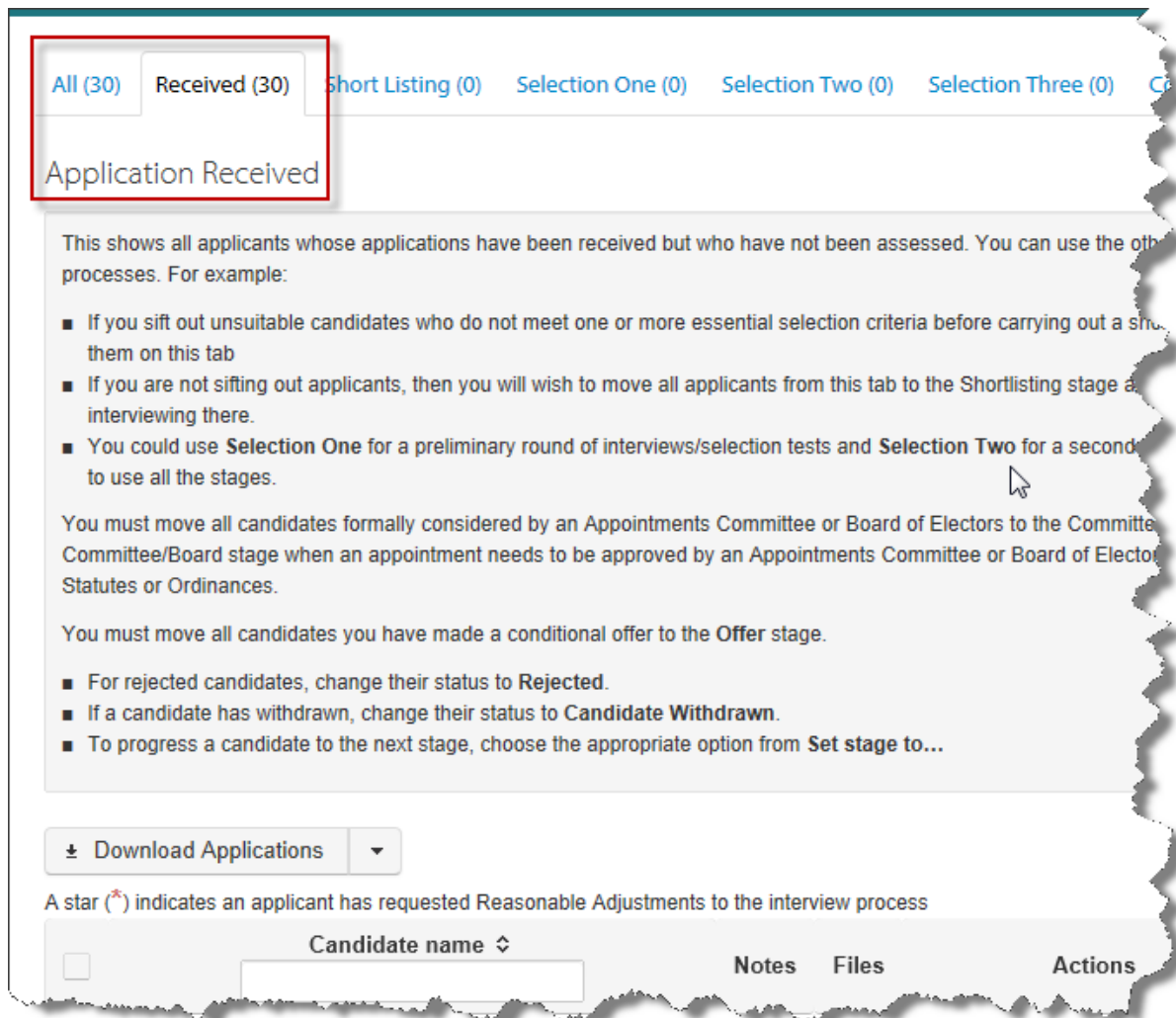
A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AK04260	Associate Dean	Advert closed	10-Jan-2015	0	Manage Vacancy	Administrator
AK04261	Associate Dean	Advert closed	10-Jan-2015	0	Manage Vacancy	Administrator
DC04259	Research Assistant/Associate	Advert closed	08-Jan-2015	34*	Manage Vacancy	Administrator
DD04192	Lector	Advert live	30-Apr-2015	0	Manage Vacancy	Administrator

2. Select **Process Applicants**.



The applicants screen will be displayed with the **Received** tab selected. This shows all applications that have been received but a decision on them (e.g. that a particular application has been rejected) not yet recorded in the system.



[All \(30\)](#)
[Received \(30\)](#)
[Short Listing \(0\)](#)
[Selection One \(0\)](#)
[Selection Two \(0\)](#)
[Selection Three \(0\)](#)

Application Received

This shows all applicants whose applications have been received but who have not been assessed. You can use the other processes. For example:

- If you sift out unsuitable candidates who do not meet one or more essential selection criteria before carrying out a shortlisting process, you can do this on this tab
- If you are not sifting out applicants, then you will wish to move all applicants from this tab to the Shortlisting stage and then to the Interviewing stage.
- You could use **Selection One** for a preliminary round of interviews/selection tests and **Selection Two** for a second round of interviews/selection tests to use all the stages.

You must move all candidates formally considered by an Appointments Committee or Board of Electors to the Committee/Board stage when an appointment needs to be approved by an Appointments Committee or Board of Electors in accordance with Statutes or Ordinances.

You must move all candidates you have made a conditional offer to the Offer stage.

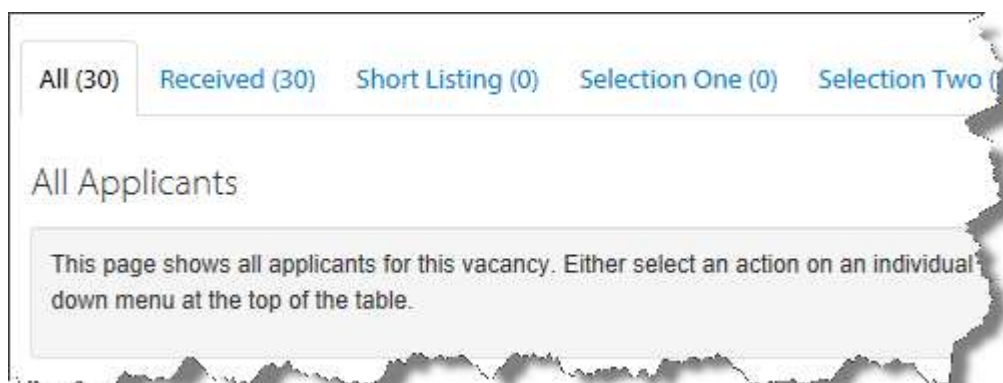
- For rejected candidates, change their status to **Rejected**.
- If a candidate has withdrawn, change their status to **Candidate Withdrawn**.
- To progress a candidate to the next stage, choose the appropriate option from **Set stage to...**

A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

<input type="checkbox"/>	Candidate name	Notes	Files	Actions
--------------------------	----------------	-------	-------	---------

You can view all applications at other stages in the process by clicking on the relevant tab.

The **All** tab shows all applicants for the vacancy, stating the stage they have reached (e.g. short-listing) and their status (e.g. rejected).



[All \(30\)](#)
[Received \(30\)](#)
[Short Listing \(0\)](#)
[Selection One \(0\)](#)
[Selection Two \(0\)](#)

All Applicants

This page shows all applicants for this vacancy. Either select an action on an individual down menu at the top of the table.

6.2 Adding, Sharing and Reviewing Applications

6.2.1 How to view PDFs of applications for a vacancy

You can view a PDF of an individual, selected or all applications for a vacancy.

1. To view an individual application, click on **Download Application** next to the relevant applicant.

<input type="checkbox"/>	Candidate name ⇅	Notes	Files	Actions	Status
<input type="checkbox"/>	Abbott, Pauline	0	0	<div style="border: 1px solid red; display: inline-block; padding: 2px;"> Download Application </div>	All ▼ Active

A pop-up window will appear, showing a PDF of the application(s).

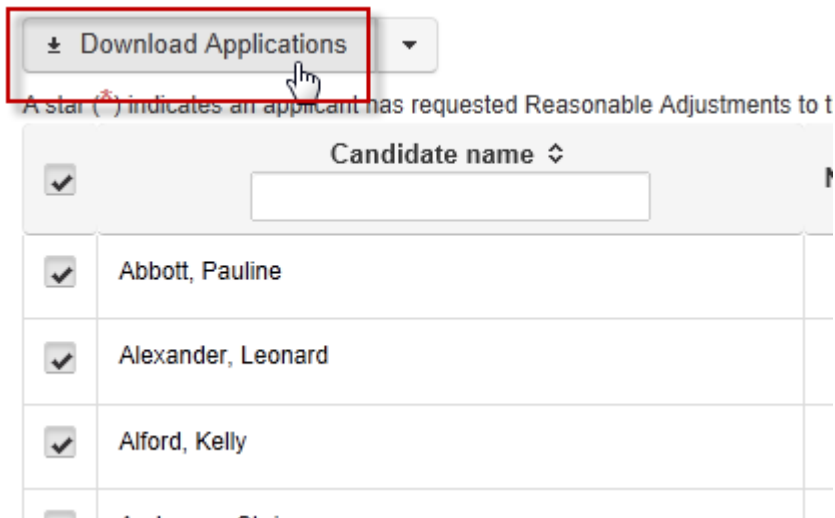


Note: If you are using Internet Explorer and experience any error messages when viewing a PDF, this is likely to be due to an issue with plug-ins on your PC. If this occurs, a workaround is to download the file and then open it from your file system. This will bypass the Adobe plug-ins for Internet Explorer.

2. To view multiple applications (either a selection or all applications), tick the box to the left of the relevant applicants names or click on the select all box, as shown below.

<input type="checkbox"/>	Candidate name ⇅
<input checked="" type="checkbox"/>	Abbott, Pauline
<input checked="" type="checkbox"/>	Alexander, Leonard
<input checked="" type="checkbox"/>	Alford, Kelly
<input checked="" type="checkbox"/>	Anderson, Chris

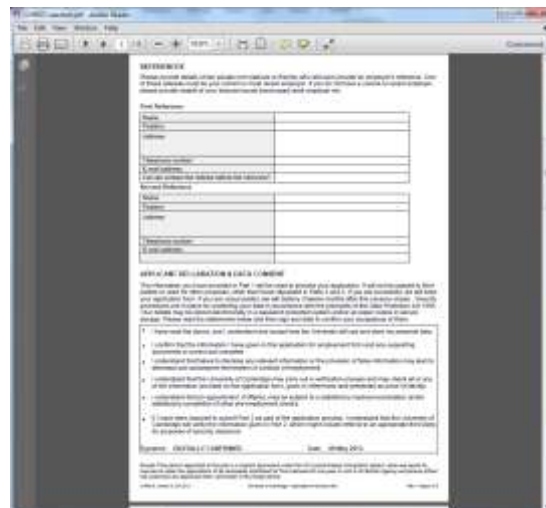
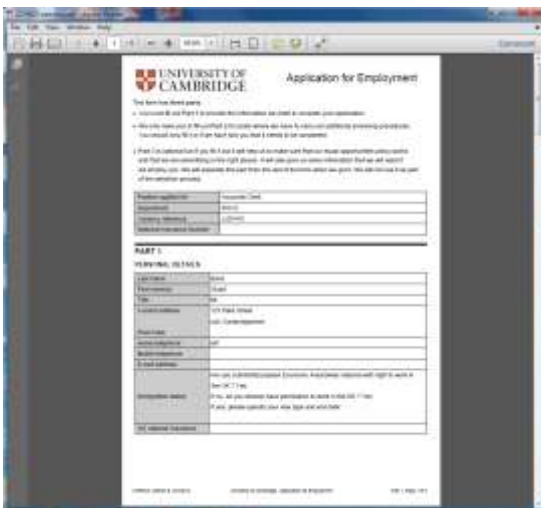
3. Click on the **Download Applications** button.




Your browser will then prompt you to save or open the pack.

4. Select **Open**.

A PDF/A pack of the application will be displayed, which will include the applicants' application forms and, in the case of a CHRIS/6 form, any attachments they provided.



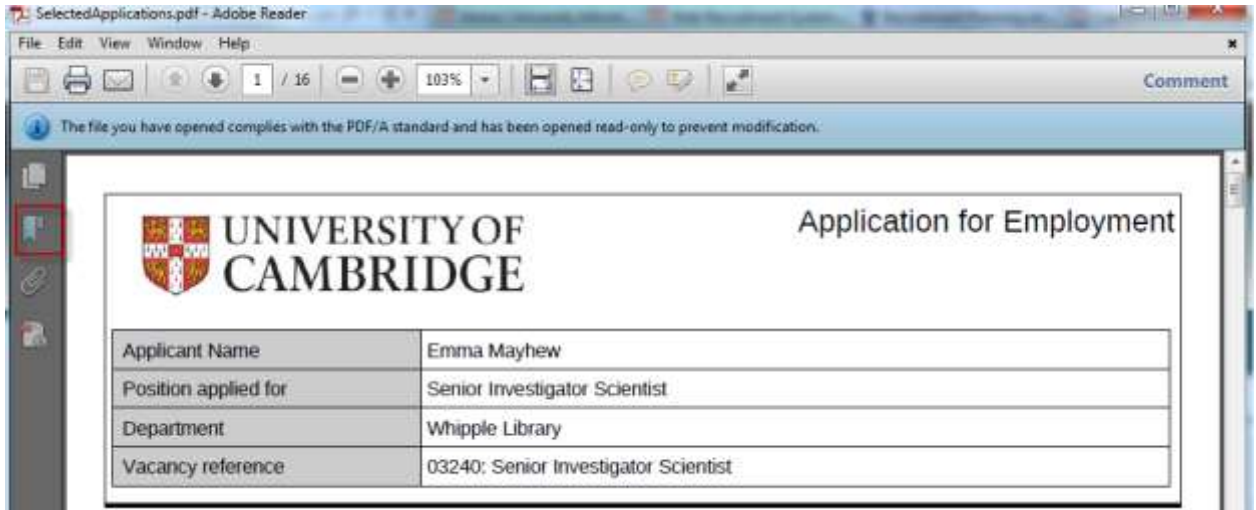
The PDF/A can be printed using **File/Print**.

 **Note:** The Equal Opportunities and Request for Reasonable Adjustments sections of the application form are not displayed in this PDF. They have been automatically separated out by the system as this information must not be used as part of the selection process.

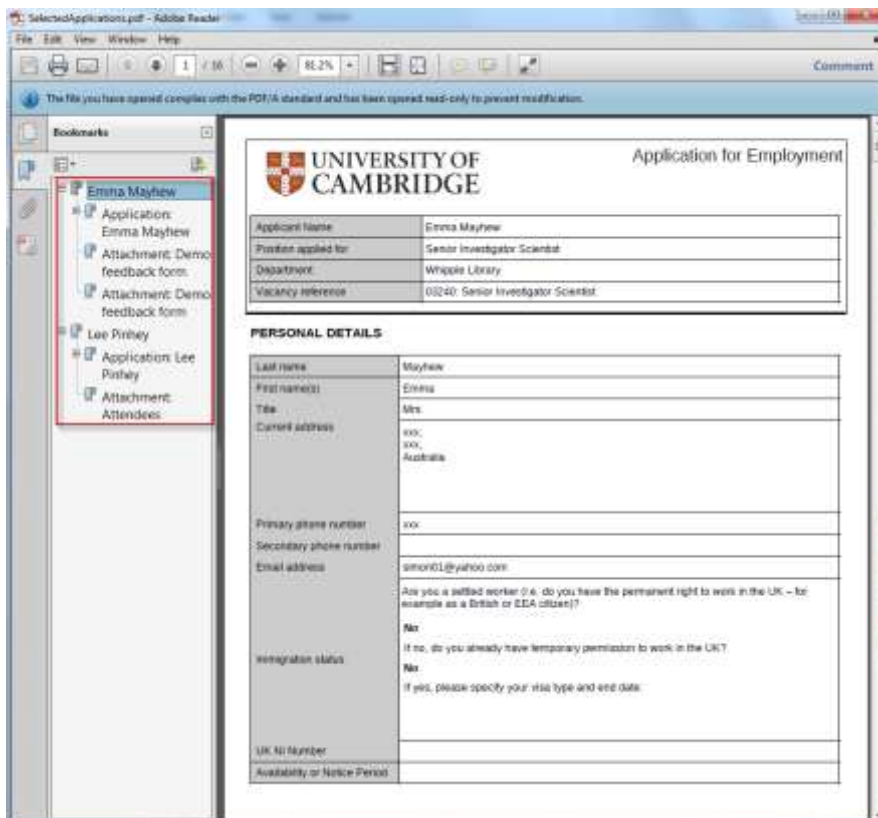
 **Note:** If you are using Internet Explorer and experience any error messages when

viewing a PDF this is likely to be due to an issue with plugins on your PC. If this occurs a workaround is to download the file and then open it from your file system and this will bypass the Adobe plugins for Internet Explorer.

- To look at a bookmarked version of the PDF, click on the bookmark icon in the left hand menu as shown below.




You can then see the documents in the pack listed separately by applicant.



You can click on any applicant or document to go directly to their application form or attachments.

Bookmarks

- [-] Emma Mayhew
 - [-] Application: Emma Mayhew
 - [-] Attachment: Demo feedback form
 - [-] Attachment: Demo feedback form
- [-] Lee Pinhey
 - [-] Application: Lee Pinhey
 - [-] Attachment: Attendees




UNIVERSITY OF CAMBRIDGE

Application for Employment

Applicant Name	Lee Pinhey
Position applied for	Senior Investigator Scientist
Department	Whipple Library
Vacancy reference	03240: Senior Investigator Scientist

PERSONAL DETAILS

Last name	Pinhey
First name(s)	Lee
Title	Mr
Current address	xx xx Barbados
Primary phone number	xx
Secondary phone number	
Email address	simon02@yahoo.com
Immigration status	<p>Are you a settled worker (i.e. do you have the permanent right to work in the UK – for example as a British or EEA citizen)?</p> <p>No</p> <p>If no, do you already have temporary permission to work in the UK?</p> <p>No</p> <p>If yes, please specify your visa type and end date:</p>
UK NI Number	
Availability or Notice Period	

 A number of departments/institutions provided feedback that they want to be able to view applications as soon as they are submitted so that short-listing can be conducted on a staggered basis. The system has been designed to meet this requirement but you should be aware that this means that:

- Appointing bodies must carry out benchmarking once the closing date has passed to ensure that they have assessed all applications consistently. Only then should applicants be informed of the results. Please see the [Recruitment Guidance](#) for further information.
- Applicants cannot amend their application themselves once they have submitted it. Departments/Institutions can amend contact details, add notes and update a successful applicant’s details before transferring to CHRIS.

6.2.2 Viewing reasonable adjustment requests

As explained in the [Recruitment Guidance](#), we have a legal duty to make reasonable adjustments to the recruitment process for applicants with a disability. In the online application form, applicants with a disability are invited to request any reasonable adjustments that they may need.

Where an applicant makes such a request, this will not be shown in their application form. This is so that information about their disability or the adjustments that they require are only shared with those making selection decisions when accommodating the type of request they have made makes this unavoidable.

Where one or more applicants for a vacancy have requested a reasonable adjustment, this is indicated on the vacancy screen with a red asterisk (*) next to the number of applicants.

A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

Job Reference	Job Title	Status	Closing Date	Applicants
AH02327	Senior Clerk	Open	12-Apr-2014	0
AM02263	Research Assistant	Open	11-Apr-2014	30*

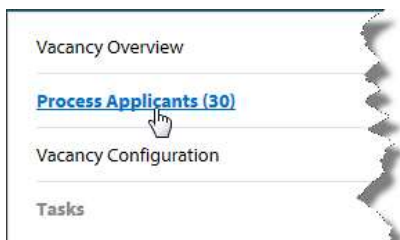
Only those with Admin access to a vacancy can view reasonable adjustment requests. Any recruiters who have only been granted Read or Write access to a vacancy are responsible for checking with a colleague with Admin access if there is anything that they need to be aware of in order to accommodate a reasonable adjustment request. Those with Admin access are responsible for checking for reasonable adjustments, ensuring that they are put into place and only sharing the information with colleagues as far as is required to accommodate the adjustment.

Those with Admin access will be able to see which applicants have requested a reasonable adjustment by clicking on **Process applicants** - the notes field next to the relevant applicant will show an asterisk (*) next to the number of notes.

Candidate name	Submitted Date	Notes	Files	Actions	Status
Brown, Brown	20-Jan-2014 16:32:30	0	0	Download Application	Rejected
Paul, Andrews	13-Nov-2013 16:56:28	2*	0	Download Application	Active

The reasonable adjustment request made can then be viewed by those with Admin access by completing the following steps:

1. Select **Manage Vacancy** from the vacancies list and then the **Process Applicants** option.



The applicant(s) who has made a reasonable adjustment request will be indicated by a red asterisk in the **Notes** column.

A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

<input type="checkbox"/>	Candidate name ⇅	Notes	Files	Actions	Status
<input type="checkbox"/>	Abbott, Pauline	2*	0	Download Application	Active

- Click the drop down arrow to the right of **Download Application** and select the **Add/View Notes** option from the menu.

A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

<input type="checkbox"/>	Candidate name ⇅	Notes	Files	Actions	Status
<input type="checkbox"/>	Abbott, Pauline	2*	0	Download Application	Active
<input type="checkbox"/>	Alexander, Leonard	2*	0	<ul style="list-style-type: none"> Email Application Add/View Notes Admin Attachments Edit Applicant 	Active
<input type="checkbox"/>	Alford, Kelly	2*	0		Active
<input type="checkbox"/>	Anderson, Chris	2*	0		Active

- The application notes will be displayed. This will include any notes added to the vacancy.

Date	Added by	Added to	Note
12-Feb-2014 15:23:23	Applicant	Application	Reasonable Adjustments requested: I am dyslexic and would require extra time to complete any written test
13-Mar-2014 17:40:07	het27	Vacancy	Interviews will be held on 03/04/14. Room F59 booked 12:00 - 16:00

- If the applicant is invited to the next stage of the selection process, you will need to ensure that the reasonable adjustments that have been requested are put into place. If you need advice on accommodating a reasonable adjustment, please contact your [HR Business Manager/Adviser](#).

6.2.3 Adding an applicant to a vacancy

In certain circumstances, an applicant may be unable to apply online (for example, because they have a disability which means that they cannot use our system).

Where this is the case, applicants are instructed to contact the relevant department/institution to request the application form in a medium that they can use. Whilst the Web Recruitment System is in the process of being implemented across the University, electronic copies of the CHRIS/5

and CHRIS/6 forms will still be available on the HR web pages at <http://www.hr.admin.cam.ac.uk/forms>

Information on providing application forms in alternative formats is found at <http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning/determine-application-process/alternative-formats>

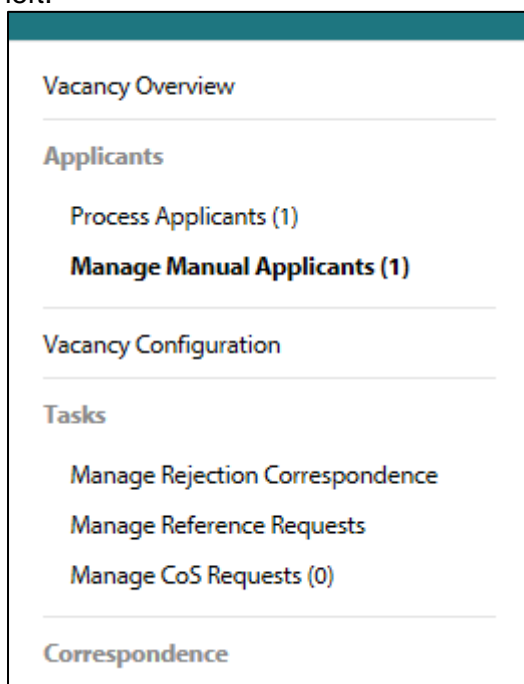


Please note: once a non-online (manual) application has been submitted to you, basic details about the applicant must be entered onto the Web Recruitment System and attachments uploaded (such as a PDF scan of the application). This ensures that:

- There is a full audit trail for your selection process stored in one place;
- You will be able to use the offer process and make an Appointment Request for the applicant (if he/she is successful) in Web Recruitment;
- The New Appointment Team will be able to transfer the applicant's details into CHRIS;
- The Compliance Team will have access to a complete set of applications/CVs in the system for those who reach the final selection stage, as required for the Resident Labour Market Test when the successful applicant requires a Tier 2 CoS; and
- The University has complete equal opportunities data.

To record an applicant who has not applied online:

- 1 Select the vacancy to which you would like to add an applicant. Click the drop down arrow on the **Manage Vacancy** button then click on **Manage Manual Applicants** on the menu to the left:



The following screen will be displayed:

AH04029: Research Associate

Manual Application List


On this page you will be able to create, edit and remove manual applications from this vacancy. When a manual application has been filled in please click the 'Submit Application' button on the Upload Documents page. Once submitted a manual application cannot be changed.

Applicant	Submitted Date	Stage
<input type="radio"/> John, Smith	12-Dec-2014 15:07:55	Offer in Progress

<< < 1 > >>

New
 Edit
 Delete

2 Click on the **New** button and the following screen will be displayed:



/ HR / HR Admin Web Application

Home Vacancies Logout

Manual Applicant Entry * Upload Documents

Manual Application

Please enter the information below and then attach any relevant forms on the next tab. Once complete you will be able to submit the application.

Personal details

Title *

Family name *

Given names *

Email

Address Line 1 *

Address Line 2

Address Line 3

Vacancy Details

Vacancy Reference:
AW0219

Vacancy Title:
Research Associate

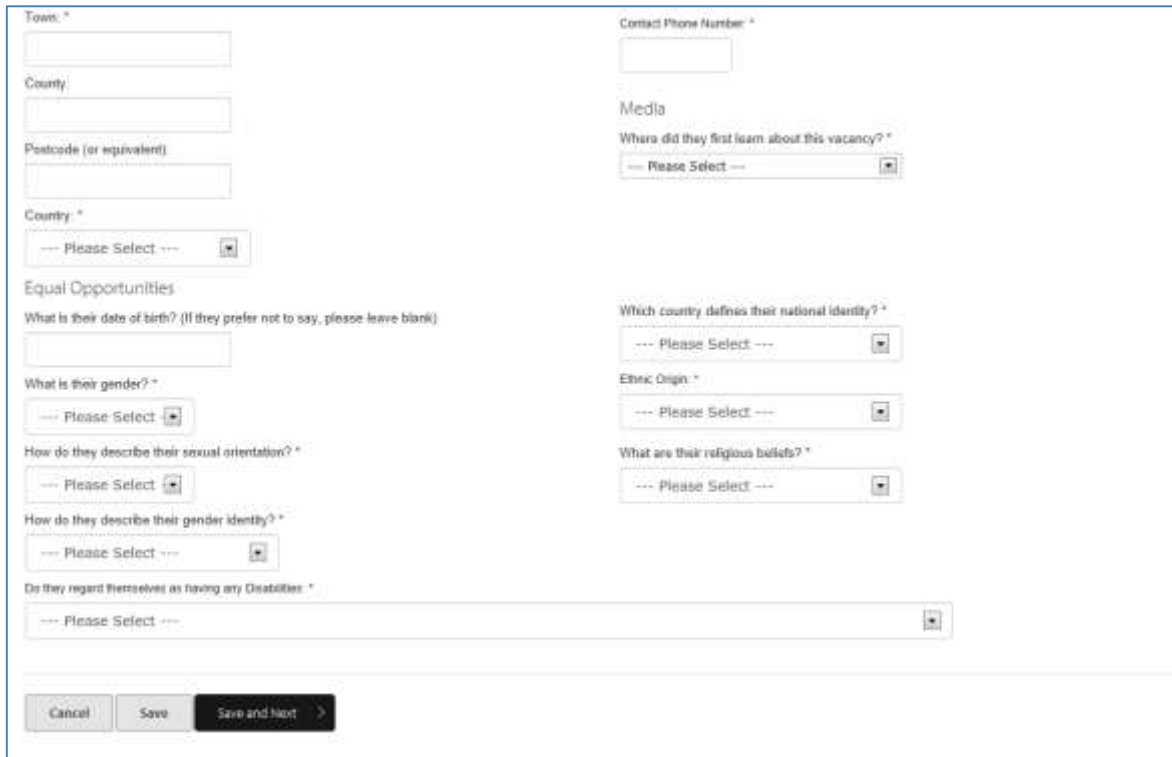
Closing Date
11-Apr-2014

Applicant Status:
Application in progress

Other Details

Is the applicant a British/European Economic Area/Swiss national with right to work in the UK?
 Yes No

If not, do they already have permission to work in the UK?
 Yes No



The screenshot shows a web form for entering applicant details. It is divided into two columns. The left column contains fields for: Town, County, Postcode (or equivalent), Country (dropdown), Equal Opportunities section with questions about date of birth, gender, sexual orientation, gender identity, and disabilities. The right column contains: Contact Phone Number, Media, Where did they first learn about this vacancy? (dropdown), Which country defines their national identity? (dropdown), Ethnic Origin (dropdown), and What are their religious beliefs? (dropdown). At the bottom, there are three buttons: Cancel, Save, and Save and Next.

This screen has two tabs. The first tab, **Manual Applicant Entry**, allows you to enter a minimum amount of essential information about the applicant. This includes details such as title, name, address, right to work status and equal opportunities information.

The screen shows the vacancy details on the right hand side.

Vacancy Details

Vacancy Reference:
AW02219

Vacancy Title:
Research Associate

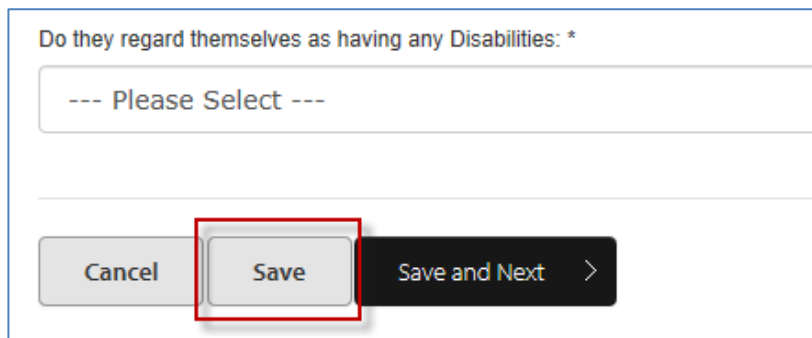
Closing Date
11-Apr-2014

Applicant Status
Application in progress

Please check that you are editing the correct vacancy.



Tip: At any point during the process, you can click on the **Save** button to save the details entered so far and then return to the form later.

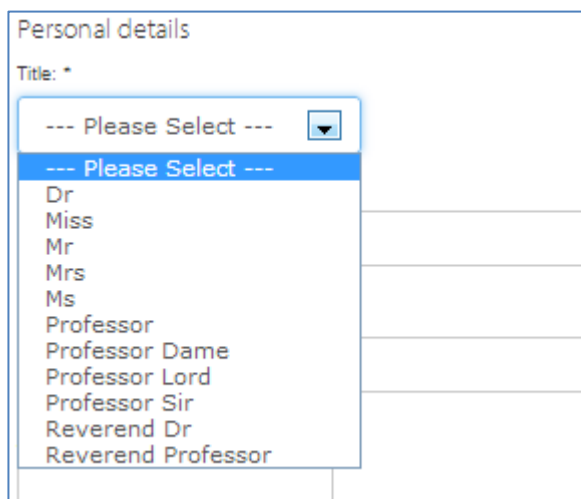


Do they regard themselves as having any Disabilities: *

--- Please Select ---

Cancel Save Save and Next >

- 3 Select the title for the applicant from the drop down list:



Personal details

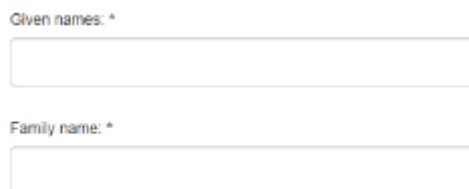
Title: *

--- Please Select ---

- Please Select ---
- Dr
- Miss
- Mr
- Mrs
- Ms
- Professor
- Professor Dame
- Professor Lord
- Professor Sir
- Reverend Dr
- Reverend Professor

This list is a subset of the titles that are acceptable within the CHRIS system. Choose the value that most closely corresponds to the details provided by the applicant.

- 4 Enter the applicant's given name (forename) and family name (surname). These fields are free format text fields.



Given names: *

Family name: *

- 5 Enter the address details for the applicant. A number of the fields (such as Town and Country) are mandatory.

Address Line 1: *

Address Line 2

Address Line 3:

Town: *

County:

Postcode (or equivalent):

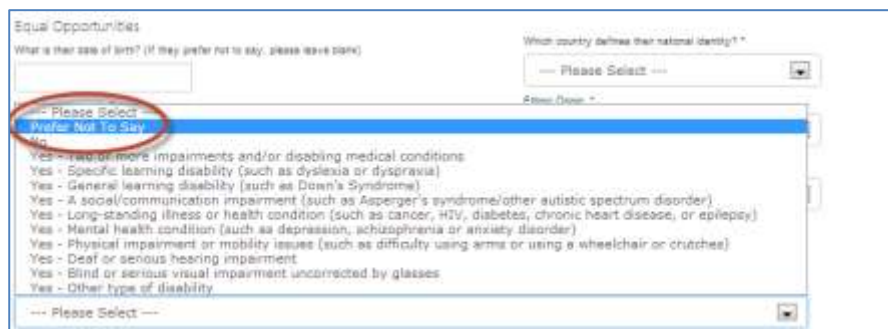
Country: *

--- Please Select ---

- 6 Enter the remaining details for the applicant, including right to work details, contact details and equality and diversity information.



Note: The Equal Opportunities section is mandatory but there is a **Prefer not to say** option for each question. This should only be used if the applicant used this response or left a field blank (the downloadable CHRIS/5 and CHRIS/6 forms tell applicants that any blank response will be treated as Prefer not to say). Entering an accurate value is important for monitoring our Equal Opportunities policy and for meeting the University’s obligation to provide the Higher Education Statistics Agency (HESA) with complete and accurate anonymised employee data.



Equal Opportunities

What is their race or ethnicity? (if they prefer not to say, please leave blank)

Which country defines their national identity? *

--- Please Select ---

Other Name *

--- Please Select ---

Prefer Not To Say

Yes - Two or more impairments and/or disabling medical conditions

Yes - Specific learning disability (such as dyslexia or dyspraxia)

Yes - General learning disability (such as Down's Syndrome)

Yes - A social/communication impairment (such as Asperger's syndrome/other autistic spectrum disorder)

Yes - Long-standing illness or health condition (such as cancer, HIV, diabetes, chronic heart disease, or epilepsy)

Yes - Mental health condition (such as depression, schizophrenia or anxiety disorder)

Yes - Physical impairment or mobility issues (such as difficulty using arms or using a wheelchair or crutches)

Yes - Deaf or serious hearing impairment

Yes - Blind or serious visual impairment uncorrected by glasses

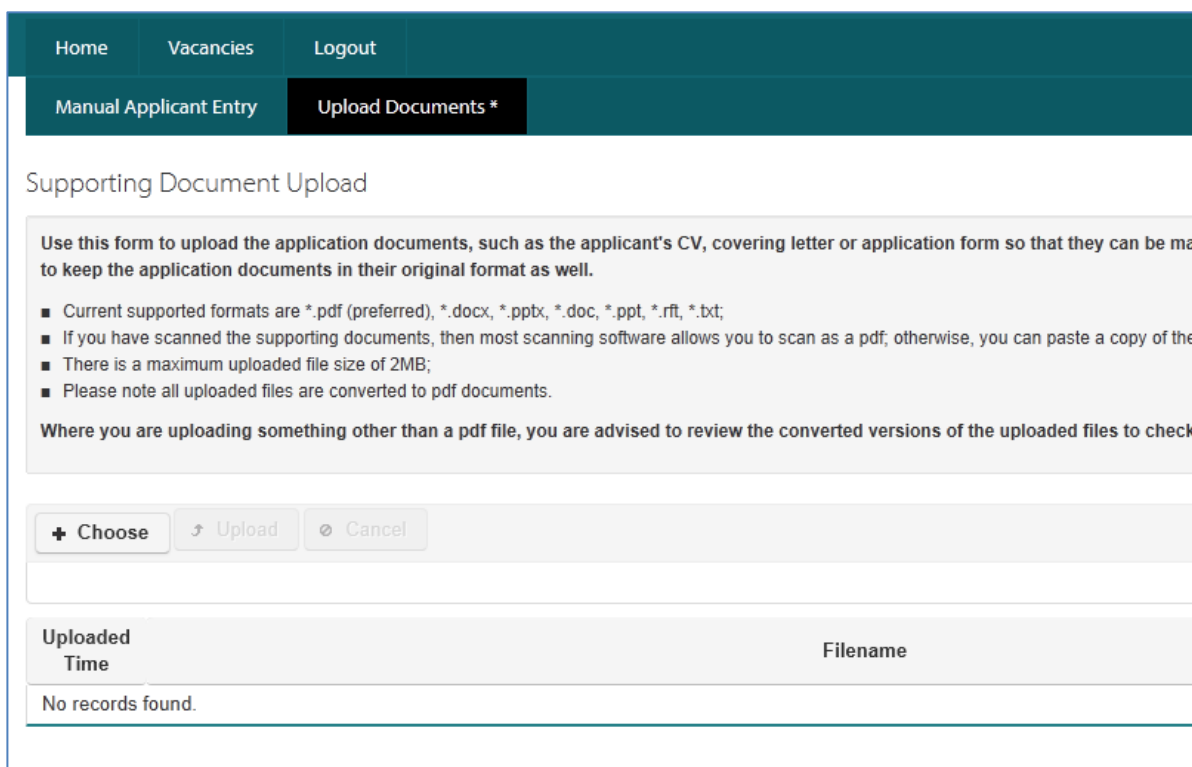
Yes - Other type of disability

--- Please Select ---

- 7 Click on the **Save** button if you would like to save your work and go on to add an attachment, or return to complete the applicant’s details at a later time.
- 8 To upload attachments for an applicant, click on the **Save and Next** button.

Cancel Save Save and Next >

- 9 This will take you to the **Upload Documents** tab to upload an attachment for an applicant. If you have received a paper-based application then you can scan it and save it as a PDF for upload, or if you have received an application by email then you can save it and upload it.



Home Vacancies Logout

Manual Applicant Entry Upload Documents *

Supporting Document Upload

Use this form to upload the application documents, such as the applicant's CV, covering letter or application form so that they can be made available to the selection panels/appointing bodies. It is highly recommended that PDFs are uploaded wherever possible. To keep the application documents in their original format as well.

- Current supported formats are *.pdf (preferred), *.docx, *.pptx, *.doc, *.ppt, *.rtf, *.txt;
- If you have scanned the supporting documents, then most scanning software allows you to scan as a pdf; otherwise, you can paste a copy of the document into a new pdf file.
- There is a maximum uploaded file size of 2MB;
- Please note all uploaded files are converted to pdf documents.


Where you are uploading something other than a pdf file, you are advised to review the converted versions of the uploaded files to check they are correct.

+ Choose Upload Cancel

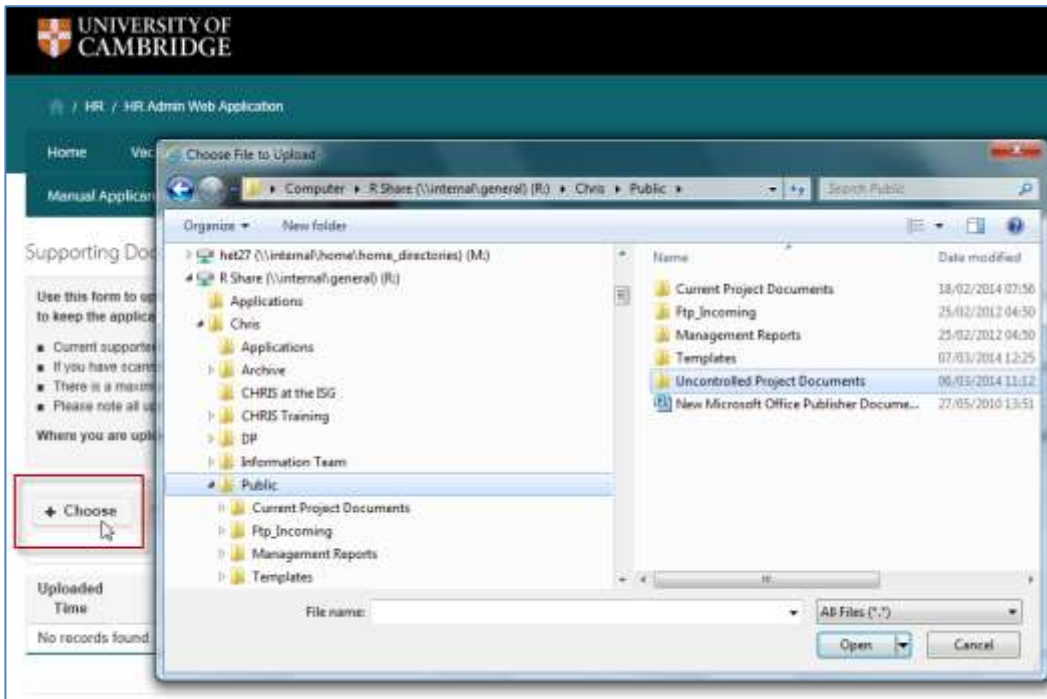
Uploaded Time	Filename
No records found.	

You can upload documents in any of the following file formats:

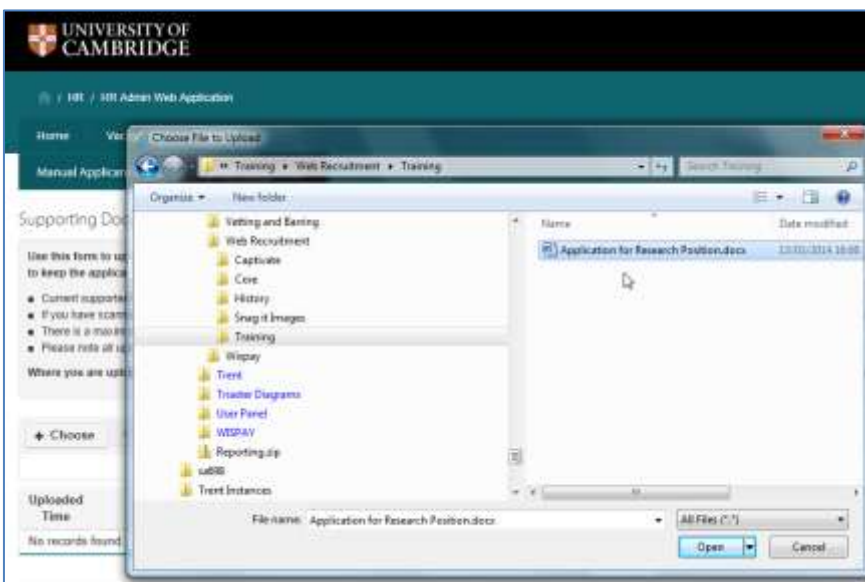
- Pdf
- Doc and Docx (Microsoft Word Format)
- Generic Rtf
- Txt
- Ppt and Pptx (Microsoft Power Point)

 **Note:** It is highly recommended that PDFs are uploaded wherever possible. A maximum limit of 4MB is permitted per file with a limit of five files totalling no more than 20MB per application. Limits are set because there is a limit to the size of attachments that can be sent via email. Selection panels/appointing bodies may need to be emailed an applicant pack (including all applications and their attachments) and so limits have to be set with regards to uploaded documents to facilitate this process.

10 To upload a document, click on the **Choose** button.



11 Navigate to the correct location in your file directory and select the file that you wish to upload before clicking on **Open**.



12 When the file has finished uploading, the file name will appear in the file list. Do not continue click on any buttons or navigate away from the screen until this has happened.

Document Upload

Use this form to upload the application documents, such as the applicant's CV, covering letter or application form so that they can be made available to the selection panel and other users. You will need to keep the application documents in their original format as well.

- Current supported formats are *.pdf (preferred), *.docx, *.pptx, *.doc, *.ppt, *.rtf, *.txt;
- If you have scanned the supporting documents, then most scanning software allows you to scan as a pdf, otherwise, you can paste a copy of the scanned image into a Word document and upload that;
- There is a maximum uploaded file size of 4MB;
- Please note all uploaded files are converted to pdf documents.

Where you are uploading something other than a pdf file, you are advised to review the converted versions of the uploaded files to check that they are true representations.

+ Choose

Uploaded Time	Filename	Action
17-Jul-2014 12:49:32	Pre-Installation Checklist Form	+ Download File

Cancel
Submit Application >

From here you can see the time and file name of your upload, and you can also download a copy of the document or delete the file.

To view the uploaded document, click on the **Download File** button in the **Action** field.

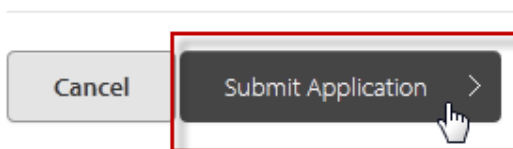
Your browser will prompt you to save or open the file.



Tip: If you have uploaded an incorrect document then click on the Delete File option and the file will be deleted.



- 13 When you have entered details of the applicant and uploaded any attachments, return to the **Manual Applicant Entry** page and click on **Submit Application** to register the application against the vacancy.



The applicant should now appear under received applications when the **Process applicants** menu item is selected in the vacancy. The application will initially be given a status of **Received**.

6.3 Sending out application packs and application-related information

If members of the appointing body are unwilling for you to give them [access to view applications](#) within the Web Recruitment System, or if they are external to the University, you can distribute copies of applications to them by downloading and printing an application pack OR by emailing an application pack.

Depending on the stage of the selection process, you may need to provide them with all or a selection of applications. Therefore, you will need to select the applicants whose applications you wish to download into the pack by ticking on the box to the left of each one.

<input type="checkbox"/>	Candidate name ⇅
<input checked="" type="checkbox"/>	Abbott, Pauline
<input checked="" type="checkbox"/>	Alexander, Leonard
<input checked="" type="checkbox"/>	Alford, Kelly
<input checked="" type="checkbox"/>	Anderson, Chris
<input checked="" type="checkbox"/>	Andrews, Jeremy

You can select all applicants on a page by clicking on the select all box at the top left of the table of applicants.

<input checked="" type="checkbox"/>	Candidate name ⇅
<input checked="" type="checkbox"/>	Abbott, Pauline
<input checked="" type="checkbox"/>	Alexander, Leonard
<input checked="" type="checkbox"/>	Alford, Kelly
<input checked="" type="checkbox"/>	Anderson, Chris
<input checked="" type="checkbox"/>	Andrews, Jeremy
<input checked="" type="checkbox"/>	Andrews, Paul
<input checked="" type="checkbox"/>	Ball, Emma

6.3.1 Downloading an applicant pack

Once you have selected the applicants you want to feature in the pack, click on the **Download Applications** button at the top of the screen.

Download Applications ▼

A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

<input type="checkbox"/>	Candidate name ↕	Notes	Files	Actions	Status
<input checked="" type="checkbox"/>	Abbott, Pauline	0	0	Download Application ▼	Active
<input checked="" type="checkbox"/>	Alexander, Leonard	0	0	Download Application ▼	Active
<input checked="" type="checkbox"/>	Alford, Kelly	0	0	Download Application ▼	Active
<input checked="" type="checkbox"/>	Anderson, Chris	0	0	Download Application ▼	Active
<input checked="" type="checkbox"/>	Andrews, Jeremy	0	0	Download Application ▼	Active

Your browser will then prompt you to save or open the pack.

Do you want to open or save SelectedApplications.pdf from staging.hrsystems.admin.cam.ac.uk?

Open Save ▼ Cancel x

Select **Open** or **Save** as required. You will be able to print the pack as necessary, although other options should be explored first to avoid wasting paper.

6.3.2 Emailing an applicant pack

Once you have selected the applicants you wish to feature in the pack, click on the **Email Applications** option at the top of the applicant list.

Download Applications ▼

Create Selection Grid

Email Applications

View Advert

has requested Reasonable Adjustments to the interview process (admin users only)


<input type="checkbox"/>	name ↕	Submitted ↕	Notes	Files	Actions	Status
<input type="checkbox"/>	Goel, Nikhil	12-Dec-2014 18:44:17	1*	0	Download ▼	Active
<input type="checkbox"/>	Gpoi, Vamshi	12-Dec-2014 18:57:09	1*	0	Download ▼	Active
<input type="checkbox"/>	Hendon, carl	12-Dec-2014 15:58:55	1	0	Download ▼	Active


An email will then be sent to your account which has an attachment with the selected applicants' details.



Note: The generated pack will reflect the format of the application form for the vacancy. For example, where the vacancy uses a CHRIS/6 form then, for each applicant, the pack will consist of the application form followed by the attachments the applicant has submitted (such as a CV, covering letter and list of research publications) in the order that the applicant uploaded them. If you require documents to be in a particular order, please instruct your applicants on this in your [HR7 Further Information document](#).

All attachments are converted to PDF/A format as an applicant submits them. The application pack will therefore be a multi-page PDF file which should be accessible to most people regardless of their local PC environment.

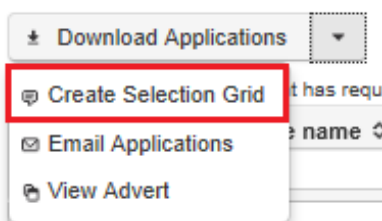
 Note: As the CHRIS/5 form is five pages in length, an additional blank page has been appended to the back of the application form so that if a pack is printed a second applicant's data is not on the back of the first applicant's form.

 Note: Various email systems have different limits on email sizes. Where there are a greater number of applicants, or where applicants have submitted more attachments, you may need to send several emails to circulate the applications for a vacancy.

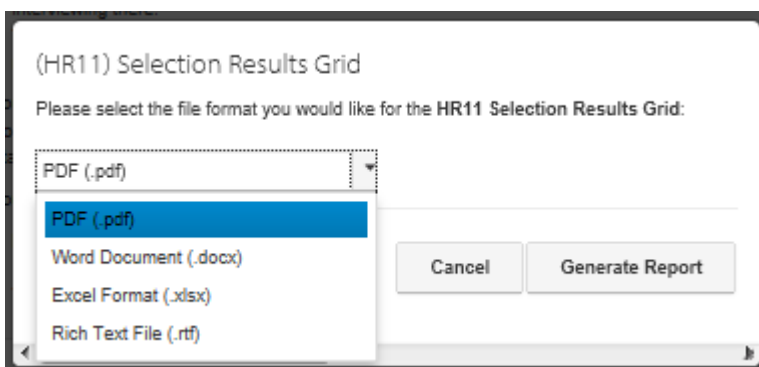
6.3.3 Creating a selection grid

A selection grid can be generated and downloaded from the system for selectors to record the results of a selection activity or stage in the process. The grid is a version of the [HR11 Selection Results Grid](#) which is pre-filled with the names of applicants who are at the selection stage you are currently in (i.e. the tab you are in when you create the grid). It also includes the applicant's right to work status (i.e. whether or not they are a settled worker) so that, when completed, the grid can be used as evidence of your selection process for the Resident Labour Market Test (where the successful applicant requires a Tier 2 CoS).

1. If you want to create a selection grid, click on the **Create Selection Grid** option from the drop-down menu found before the list of applicants within the relevant selection stage tab.




2. Select the format for the grid.



3. Click on **Generate Report**.

This will display the selection grid in the format you selected.



Selection Results Grid

Vacancy Title	Language Teaching Officer	Vacancy Reference Number	04288
Department / Institution	Cambridge University Students Union	Selection Stage	Selection One
Names of Assessors	Signature of Assessors		
Decision Rules			

Candidate	Settled Worker	Selection Criteria Score										Total for Essential Criteria	Total for All Criteria	Decision and Comments/Reasons	
		1	2	3	4	5	6	7	8	9	10				
Mr Patrick Smith	No														

You can now save or print the grid for use by the selectors.

6.3.4 Generating applicant and referee reports

Please see the Web Recruitment manual on Generating Applicant and Referee reports on the [HR systems web pages](#) for details of how to generate reports to use for mail merging, selection and reporting.

6.4 Updating applicant records and their progress

When you are within one of the stage tabs for a vacancy, there are a number of actions that can be carried out on an individual applicant basis:

- Updating the stage and status of applicants;
- Editing the personal details of applicants;
- Adding attachments; and
- Adding notes.

The following sections describe these processes.

6.4.1 Updating selection stages and statuses

An individual with Admin or Write access to the vacancy is responsible for recording the details of the selection process and moving applicants between stages. It is a department/institution decision as to whether a member of an appointing body is given this level of access to record decisions made during each stage of the selection process, or whether this is done on their behalf.

A number of stages have been defined and these are:

- Application Received (Received);
- Progressed to Short-listing (Short-listing);
- First Selection Stage (Selection One);

- Second Selection Stage (Selection Two);
- Third Selection Stage (Selection Three);
- To be considered by Appointments Committee/Board of Electors (Committee/Board); and
- Offer in progress (Offer).

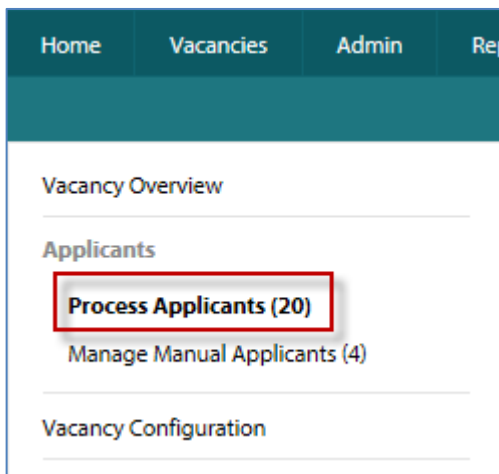
The brackets in the list above indicate the abbreviated name of each stage as it shows on the tabs across the top of the screen. For clarity, a full version of each stage name is used in the drop-down list where you change the status/stages of applicants.

You can use as many of the stages as are appropriate to fit your local requirements or your particular vacancy. Please see the Recruitment Guidance for information on planning your selection process (<http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning>).

1. From the main vacancy screen, click on the **Manage Vacancy** button next to the vacancy you wish to manage.



2. Select **Process Applicants**.



A list of applicants will be displayed.

<input type="checkbox"/>	Candidate name ↕	Notes	Files	Actions	Status
<input type="checkbox"/>	Abbott, Pauline	3*	1	Download Application	Active
<input type="checkbox"/>	Alexander, Leonard	3*	0	Download Application	Active
<input type="checkbox"/>	Alford, Kelly	2*	0	Download Application	Active
<input type="checkbox"/>	Anderson, Chris	2*	0	Download Application	Active
<input type="checkbox"/>	Andrews, Jeremy	2*	0	Download Application	Active
<input type="checkbox"/>	Andrews, Paul	2*	0	Download Application	Active
<input type="checkbox"/>	Ball, Emma	2*	0	Download Application	Active

Initially, all submitted applications which have been received but not yet assessed appear in the **Application Received** tab. There is also an **All** tab which lists everyone who has applied for the vacancy and their current stage (e.g. Received, Short-listing) and status (e.g. Active, Rejected). Applicants will always show on the **All** tab, as well as under the tab for the process stage that they are currently in.

The number of applicants at a given stage is shown next to the stage name.

AW02219: Research Associate

[All \(30\)](#)
[Received \(30\)](#)
[Short Listing \(0\)](#)
[Selection One \(0\)](#)
[Selection Two \(0\)](#)
[Selection Three \(0\)](#)
[Committee/Board \(0\)](#)
[Offer \(0\)](#)

Application Received

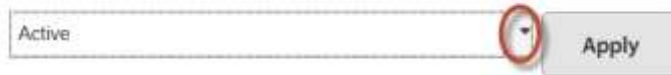
- Click on the tab that reflects the selection stage you wish to view or process. This will display the current applicants at that stage of the process.

When you first begin managing applicants, you will be clicking on Received as all applicants will be listed there.

- Tick the box to the left of the applicant(s) you wish to process.

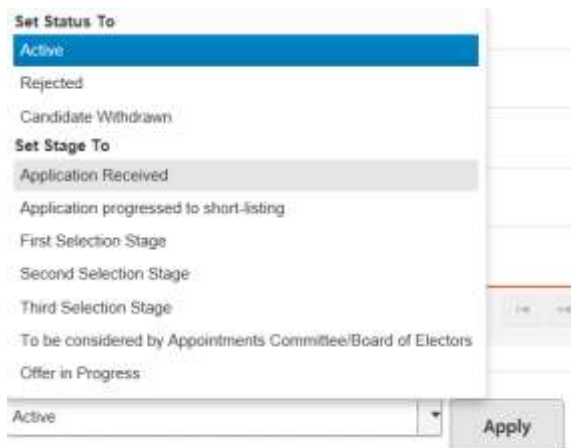
<input checked="" type="checkbox"/>	Alexander, Leonard	3*	0	Download Application	Active
<input checked="" type="checkbox"/>	Alford, Kelly	2*	0	Download Application	Active
<input type="checkbox"/>	Anderson, Chris	2*	0	Download Application	Active
<input checked="" type="checkbox"/>	Andrews, Jeremy	2*	0	Download Application	Active
<input checked="" type="checkbox"/>	Andrews, Paul	2*	0	Download Application	Active
<input type="checkbox"/>	Ball, Emma	2*	0	Download Application	Active

- At the bottom of your list of applicants, there is a drop-down menu with an **Apply** button next to it. Click on the drop-down menu arrow to open up the options.



You will see in the list that you can either:

- Change the selected applicants' status (i.e. to indicate whether they are active in the stage of the process you are currently reviewing or if they have been rejected or withdrawn at that stage); OR
- Move the applicants to another stage in the process (e.g. if you are inviting them to a first round interview/selection event then you would move them to First Selection Stage).



- Choose the status or stage you wish to allocate to your selected applicants from the drop-down list and then click on **Apply**.



- The **Confirm Action** screen will be displayed.

Confirm Action ✕

4 Applicant(s) Selected:

Are you sure you want to change the **Status** of the following applicants to **REJECTED** ?

■ Alford, Kelly
■ Alexander, Leonard
■ Andrews, Jeremy
■ Andrews, Paul

Yes
No

If you have recorded a status of **Rejected** or **Withdrawn** for certain applicants, those applicants will now be greyed out and showing a status of Rejected or Withdrawn (as applicable).

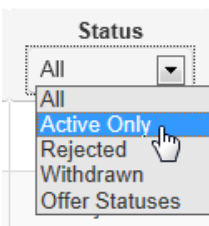
A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

i Updates Successful
 Candidates records updated

	Candidate name ⇅	Notes	Files	Actions	
<input type="checkbox"/>	Abbott, Pauline	3*	1	Download Application	Active
<input type="checkbox"/>	Alexander, Leonard	5*	0	Download Application	Rejected
<input type="checkbox"/>	Alford, Kelly	4*	0	Download Application	Rejected
<input type="checkbox"/>	Anderson, Chris	2*	0	Download Application	Active
<input type="checkbox"/>	Andrews, Jeremy	4*	0	Download Application	Rejected
<input type="checkbox"/>	Andrews, Paul	4*	0	Download Application	Rejected

If you applied a new stage for certain applicants using the drop-down menu, they will have moved from the stage they were in (e.g. Application Received) and their details will be moved to the new stage you selected (e.g. Short-listing or First Selection Stage).

You can use the Status drop-down to view Active Only, Rejected, Withdrawn or Offer statuses.



Applicants can be processed through all stages relevant to the vacancy’s selection process.



Note: If you are conducting long-listing to sift a large volume of applications down to a

manageable number, any of those rejected should be given a status of **Rejected** within the **Application Received** tab. Any applications not sifted out and which you will give a complete review in order to carry out short-listing should be moved to the stage **Progressed to short-listing**. If you have a small number of applications and intend to carry out short-listing on all of them, all applicants should be moved to the stage **Progressed to short-listing**. Guidance on long-listing and short-listing can be found at <http://www.hr.admin.cam.ac.uk/recruitment/step-3-recruit-and-select>.

You could use **First Selection Stage** for a preliminary round of interviews/selection tests and **Second Selection Stage** for a second round of interviews. You do not need to use all the stages.

You must move all candidates formally considered by an Appointments Committee or Board of Electors to the **To be considered by Appointments Committee/Board of Electors** stage. Only use this stage when an appointment needs to be approved by an Appointments Committee or Board of Electors formally constituted under the Statutes or Ordinances.



Note: It is important that you update the system with all applications received outside of the system (manual applications) and the outcomes for each stage of the selection process for all applicants because:

- Otherwise recruitment data generated for departments/institutions/HR will be incorrect. For example, equality data required for Athena SWAN applications, (to justify/assess positive action in the recruitment process, or reporting how successful our equality policies are) will not give an accurate reflection of where applicants reached in the recruitment process.
- Any HR11 Selection Results Grid that you download from the system to record the assessments made in the selection process will not be complete and accurate for the purposes of the Resident Labour Market Test (where the successful applicant requires a Tier 2 CoS).
- The graph identifying where each applicant saw the vacancy advertised will be of limited use (as will the future standard report on this).
- It enables you to ensure that all applications have been considered and progressed to the next stage or rejected, without the need for a separate manual tracking process.
- The University's internal auditors for recruitment will expect to see a clear audit trail which shows that all applications received have been assessed and progressed or rejected. This was one of the concerns raised in the previous audit.
- It ensures that you are able to maximise the benefits of other features within the Web Recruitment System. For example:
 - Moving rejected applicants to 'Rejected' enables users to generate rejection emails/letters from within the System.

- Moving the successful applicant to ‘Offer’ stage enables you to record offer details in the system instead of in the CHRIS Recruitment Module and removes the need for you to complete a CHRIS/10A form. It also means that you can generate an offer letter from the system and submit an electronic Appointment Request to the HR New Appointment Team.
- It is not possible to mark a vacancy as ‘Complete’ (i.e. that the selection process has ended) without recording the outcomes of the selection process (i.e. if applicants have not been rejected or made an offer). Please see section on [Completing Recruitment for a Vacancy](#) for details of why it is important to be able to complete a vacancy in the system.

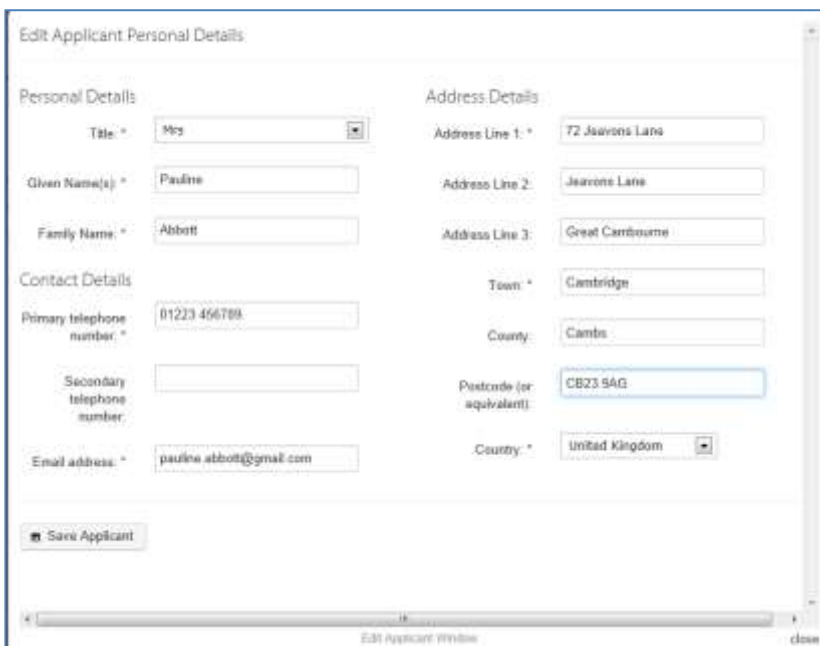
6.4.2 Editing the details of an existing applicant

If an applicant contacts you during the recruitment process to inform you that his/her personal details have changed (e.g. name, contact details), you can edit these within the system.

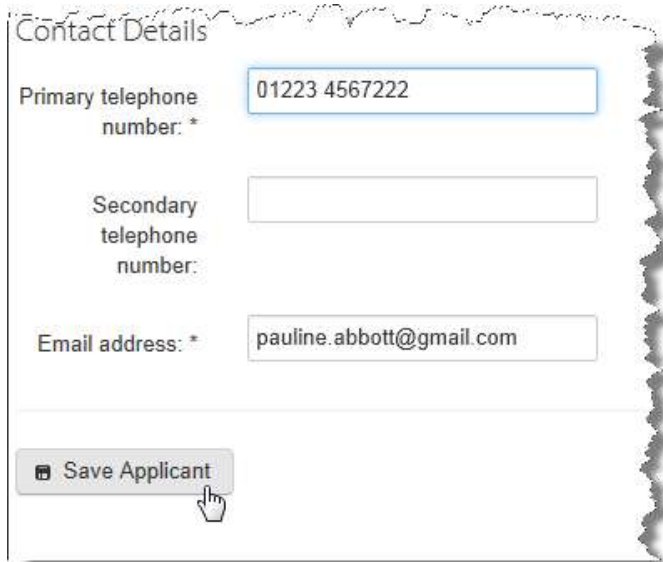
1. Click on the drop-down list in the **Actions** column. Select **Edit Applicant** from the list.



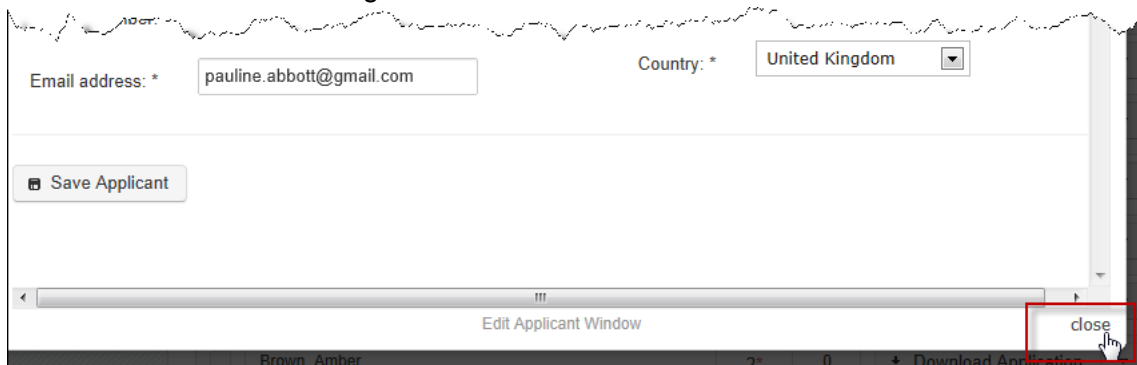
An **Edit Applicant Personal Details** pop-up window will appear, as shown below.



- Amend the details you need to change in the relevant field, then click on the **Save Applicant** button at the bottom of the window.



- Click on **Close** at the bottom right-hand side of the window.



Please note: an entry describing the change that has been made, when it was made and your CRS-ID will be recorded automatically in the **Notes** for the applicant concerned.

6.4.3 Adding attachments to an existing applicant

You may wish to save documents relating to an applicant with their record in the Web Recruitment System so that all information about them within the recruitment process is found in one place. For example, you may wish to upload:

- HR8 Response to Enquiry (<http://www.hr.admin.cam.ac.uk/forms/hr8-response-enquiry-template>);
- HR10 Assessment Record (<http://www.hr.admin.cam.ac.uk/forms/hr10-assessment-record>);
- HR13 Invite to Interview Letter (<http://www.hr.admin.cam.ac.uk/forms/hr13-invite-interview-letter-template>);
- HR17 Assessor Notes template (<http://www.hr.admin.cam.ac.uk/forms/hr17-assessor-notes-template>);

- HR4 Salary Case for Approval (<http://www.hr.admin.cam.ac.uk/forms/hr4-starting-salary-case>);
- HR23 Welcome Letter (<http://www.hr.admin.cam.ac.uk/forms/hr23-welcome-letter-template>).



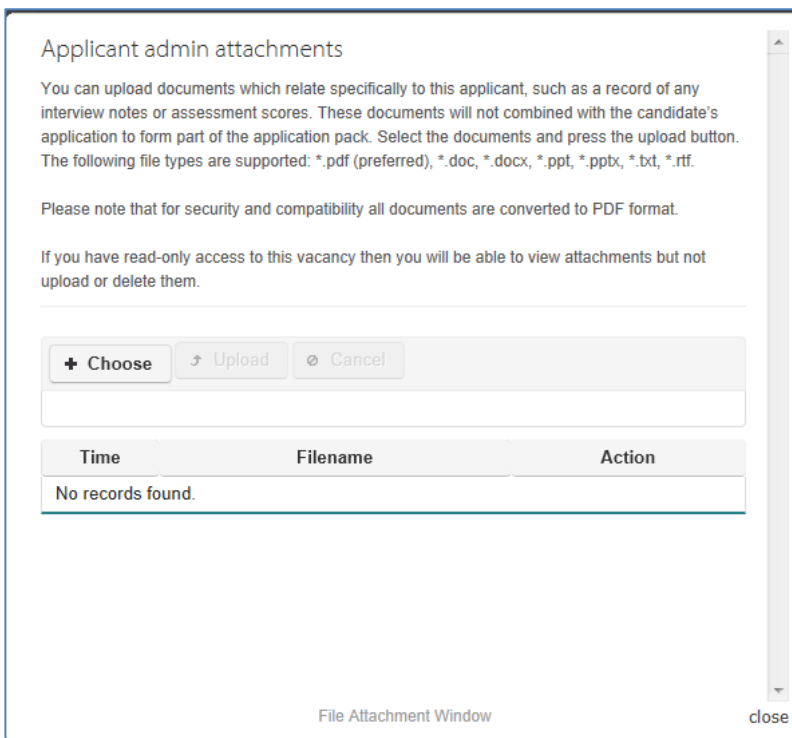
Tip: Store documents against an applicant if they relate to one applicant only. [Store documents against a vacancy](#) if they relate to the job, the recruitment process or multiple applicants.

Please note: under Data Protection Legislation, all applicants are entitled to make a subject access request to see all personal data held on them, including documentation from the recruitment process. Therefore, it is vital that any recruitment documentation stored within the system (or elsewhere) contains only appropriate information which demonstrates that a fair, objective process took place.

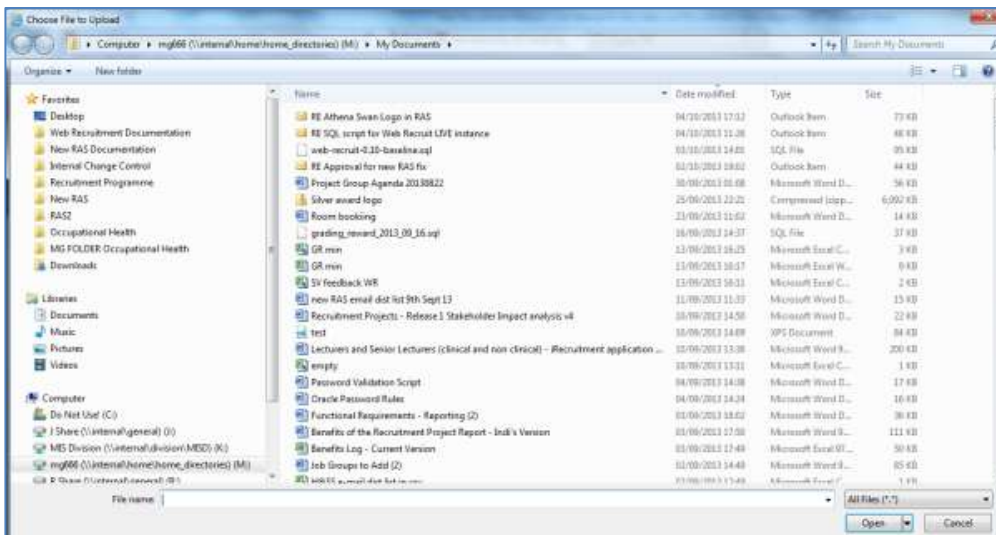
1. To upload an attachment for an existing applicant, click on the drop-down list in the Actions column for the relevant applicant. Select **Admin Attachments**.

<input type="checkbox"/>	Candidate name ⇅	Notes	Files	Actions
<input type="checkbox"/>	Abbott, Pauline	2*	0	<ul style="list-style-type: none"> Download Application Email Application Add/View Notes Admin Attachments Edit Applicant Download Application
<input type="checkbox"/>	Alexander, Leonard	2*	0	<ul style="list-style-type: none"> Download Application Email Application Add/View Notes Admin Attachments Edit Applicant Download Application
<input type="checkbox"/>	Alford, Kelly	2*	0	<ul style="list-style-type: none"> Download Application Email Application Add/View Notes Admin Attachments Edit Applicant Download Application
<input type="checkbox"/>	Anderson, Chris	2*	0	<ul style="list-style-type: none"> Download Application Email Application Add/View Notes Admin Attachments Edit Applicant Download Application

The following screen will then be displayed, including information about the types of file you can upload.



2. Click on **Choose**. Your file directory will then be displayed.



3. Select a file to be uploaded from your file directory. Double-click on it or click on **Open**.

4. You will be returned to the pop-up window. You will see the name of the file you have selected. Click on the **Upload** button as shown below, to upload the file (you can click on the **Cancel** button if you have chosen the wrong file).

Applicant admin attachments

You can upload documents which relate specifically to this applicant, such as a record of any interview notes or assessment scores. These documents will not combined with the candidate's application to form part of the application pack. Select the documents and press the upload button. The following file types are supported: *.pdf (preferred), *.doc, *.docx, *.ppt, *.pptx, *.txt, *.rtf.

Please note that for security and compatibility all documents are converted to PDF format.

If you have read-only access to this vacancy then you will be able to view attachments but not upload or delete them.

+ Choose
↗ Upload
⊗ Cancel

HR10 Assessment Record.doc

×

Time	Filename	Action
No records found.		

The document will then be uploaded and displayed in the table of attachments as shown below.

Applicant admin attachments


You can upload documents which relate specifically to this applicant, such as a record of any interview notes or assessment scores. These documents will not combined with the candidate's application to form part of the application pack. Select the documents and press the upload button. The following file types are supported: *.pdf (preferred), *.doc, *.docx, *.ppt, *.pptx, *.txt, *.rtf.

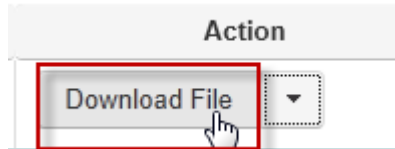
Please note that for security and compatibility all documents are converted to PDF format.

If you have read-only access to this vacancy then you will be able to view attachments but not upload or delete them.

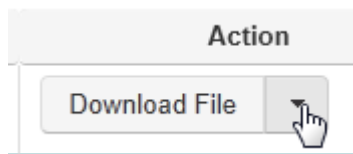
+ Choose
↗ Upload
⊗ Cancel

Time	Filename	Action
2014-03-13T18:37:54.642	HR10 Assessment Record	<div style="text-align: right; margin-bottom: 5px;"> ⊗ </div> <div style="text-align: right;"> ↶ Download File </div>

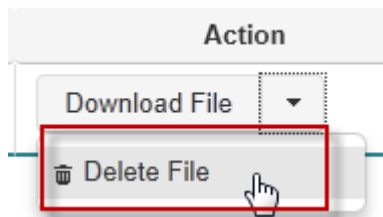
 **Tip:** To check the file content, click on the **Download File** button in the action field next to the relevant document in the table of attachments.



To delete the document click the drop down arrow next to the Download File button.



Select **Delete File**.



Click on **Close** at the bottom right-hand side of the pop-up window to return to the main applicants screen.

6.4.4 Adding notes to an applicant's record

It is possible for you to add notes to an applicant's record, which provide an auditable trail of the applicant's progress through the process. Notes are automatically added by the system when you amend the stage an applicant has reached or an applicant's status.

You may record information such as:

- Contact with the applicant, for example, if he/she contacts you to withdraw his/her application or to inform you that he/she cannot make the interview date/time offered.
- That a manual application you have added was screened and put forward by an agency that has been helping you to source candidates.
- Reasons for an action taken, for example, a summary of why the individual's application has been rejected (although detailed reasons should be provided on a document such as the HR10 Assessment Record, particularly for stages after long-listing).

Please describe the source of the comments (for example, phone conversation with the applicant or notes from the interview panel).

Please note: under Data Protection Legislation, all applicants are entitled to make a subject access request to see all personal data held on them, including documentation from the recruitment process. Therefore, it is vital that any recruitment documentation stored within the system or elsewhere) contains appropriate information which demonstrates that a fair, objective process took place.

1. Click on the **Actions** drop-down menu for your chosen applicant (next to Download Application).
2. Select **Add/View Notes**.

<input type="checkbox"/>	Alexander, Leonard	2*	0	Download Application Email Application Add/View Notes Admin Attachments Edit Applicant
<input type="checkbox"/>	Alford, Kelly	2*	0	
<input type="checkbox"/>	Anderson, Chris	2*	0	
<input type="checkbox"/>	Andrews, Jeremy	2*	0	

3. An **Add Note to Application** pop-up window will appear. Write your note in the **New Note** text box and click on **Add Note**.

Application notes

These notes provide a history of the application - they are an auditable trail and can be used to note changes to the applicants details, interview notes or other relevant information.
Please describe the source of the comments (eg phone conversation with applicant, notes from interview panel etc)

Note that any notes made here are subject to the Data Protection Act, and are disclosable to the applicant.

If you have read-only access to this vacancy then you will be able to view application notes but not add or edit them.

New Note (740 characters remaining)

Kelly Alford telephoned Gill West on 13/03/2014 to inform us that she is unavailable for interview on 03/04/14. An alternative interview date has been requested. Gill is liaising with the Appointing Body to see if this is possible before going back to Kelly.

^ Add Note

4. Your note, the date and your CRS-ID will be displayed in the table underneath.

Date	Added by	Added to	Note
12-Feb-2014 15:23:23	Applicant	Application	Reasonable Adjustments requested: I am dyslexic and would require extra time to complete any written test
13-Mar-2014 17:40:07	het27	Vacancy	Interviews will be held on 03/04/14. Room F59 booked 12:00 - 16:00
13-Mar-2014 18:45:46	het27	Application	Kelly Alford telephoned Gill West on 13/03/2014 to inform us that she is unavailable for interview on 03/04/14. An alternative interview date has been requested. Gill is liaising with the Appointing Body to see if this is possible before going back to Kelly.

- Click **Close** at the bottom right-hand side of the pop-up window. You will be returned to the main applicants screen for the vacancy.

6.5 Sending rejection correspondence and reference requests

Please see the Web Recruitment user guide on Generating Correspondence on the [HR Systems web pages](#) for details of how to generate and send rejection correspondence to applicants.

Please see the Web Recruitment user guide on Generating Correspondence on the [HR Systems web pages](#) for details of how to generate and send reference requests using the system.

6.6 The Offer Stage

- When the selection process for the vacancy has been completed and a successful applicant has been selected, you must move him/her (or them, if you have more than one successful applicant) to the **Offer in Progress** stage.

<input checked="" type="checkbox"/>	Davies, Fraser	2*
-------------------------------------	----------------	----

(2 of 2) << < 1 2 > >>

Offer in Progress **Apply**

The following **Confirm Offer** dialog box will then appear.

Confirm Offer ✕

1 Applicant(s) Selected:

You are about to move the following applicants to the Offer stage. If known, please state whether an applicant will require a Certificate of Sponsorship, these CoS requests can be managed under the 'Manage CoS Requests' section.

Applicant Name	CoS Required?
Ball, Emma	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">CoS Required ▾</div>

The confirmation window will indicate whether a Tier 2 CoS may be needed by the successful applicant based on his/her responses to right to work questions in their application form. However, you must double-check the successful applicant's right to work status with him/her and establish if he/she needs a Tier 2 CoS.

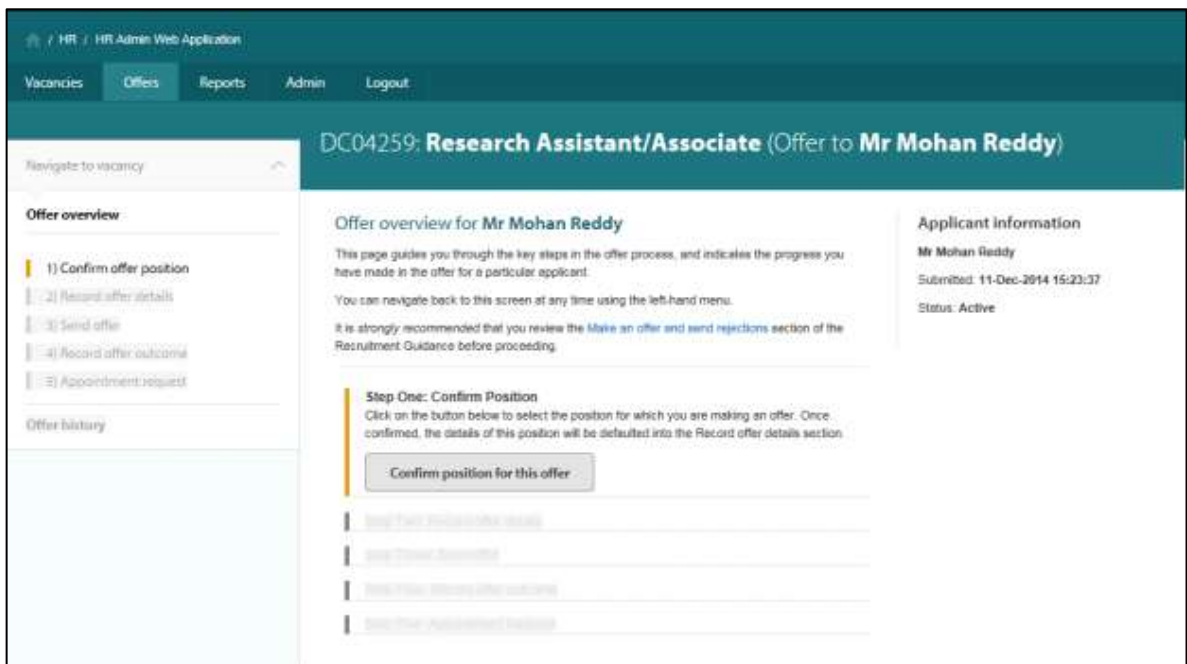


Please ensure that you record the requirement for a CoS (or not) accurately for each of your vacancies in Web Recruitment

It is very important that this information is recorded correctly because the University is required by law to keep certain documents and information from the recruitment process indefinitely where an individual requires a Tier 2 CoS. The Web Recruitment System will only retain records beyond the normal [University retention period](#) for completed vacancies where the successful applicant is recorded as requiring a CoS (or it is otherwise instructed to do so by a super-user).

As required, you can amend the default by selecting from the drop-down list. Once you have made any changes and you wish to move the successful applicant to the Offer stage, click on the **'Yes, update applicants'** button.

- The applicant(s) will then be displayed in the **Manage Offers** screen, where you will be routed automatically after moving an applicant to **Offer in progress**.



Please see the Managing Offers user guide on the [Web Recruitment system page](#), which describes the six step offer process in detail.

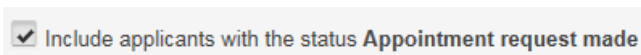
A quick reference guide to managing offers can also be found on the [Web Recruitment system page](#).

As well as appearing within the six step offer process for the vacancy, the applicant will also appear on the **Offers** tab that lists all of the offers to which you have access across your vacancies:



The screen shows offers where the six step process has not been finished (i.e. an Appointment Request has not yet been made) by default.

You can view offers where an Appointment Request has been made by ticking the box at the top of the screen:



The 'Offer' progress bar show the status of the offer:

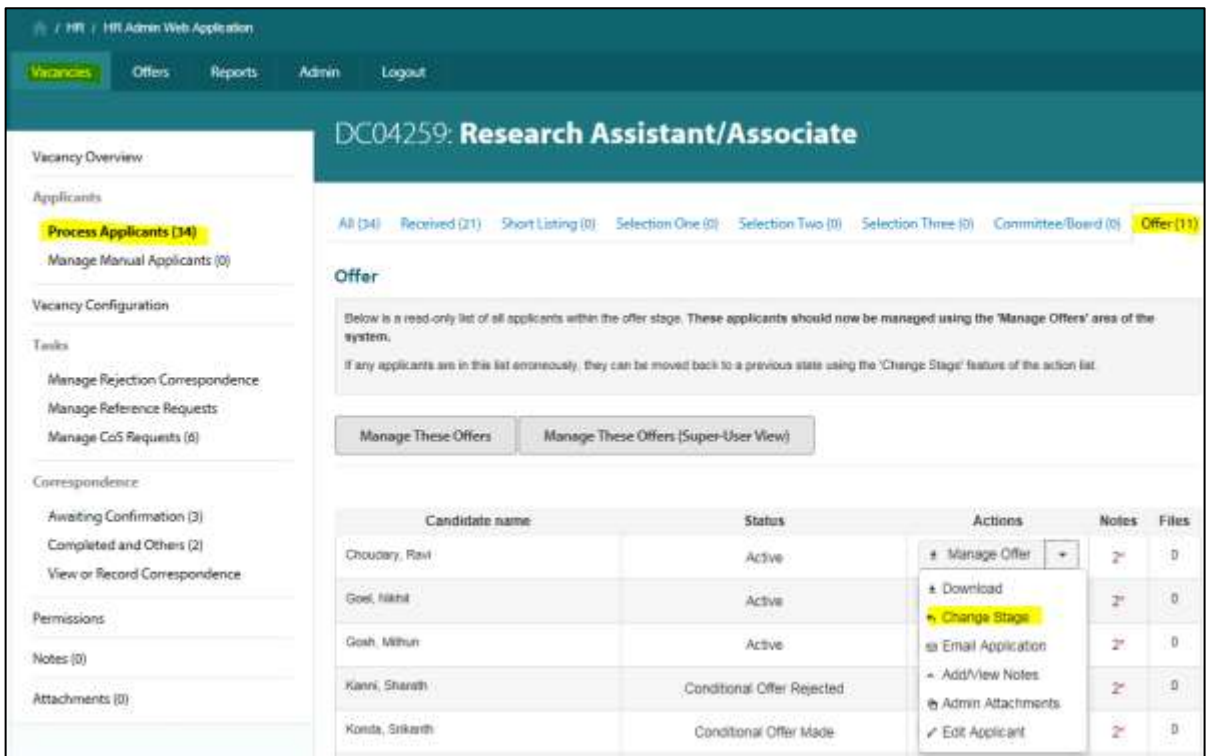


Click on **Manage Offer** to re-enter the Offer process for that applicant.

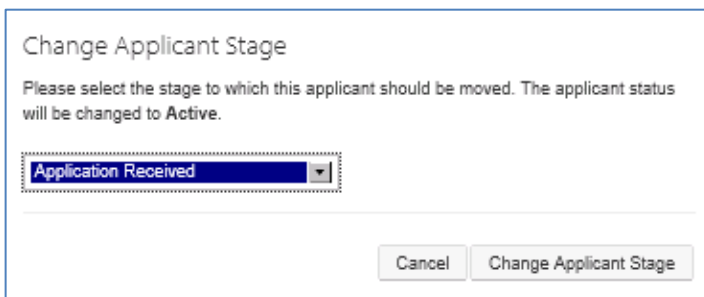


Note: each applicant at this stage is managed individually and you can no long perform tasks across multiple applicants.

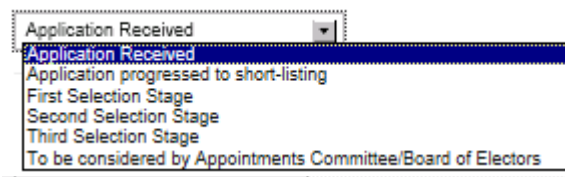
If an applicant has been move to offer incorrectly then go to the **Vacancies** tab, click on **Process Applicants**, click on the **Offer** tab, and select **Change stage** from the action list for the relevant applicant.



You will then see the following pop up window:



Select the stage from the drop down list:

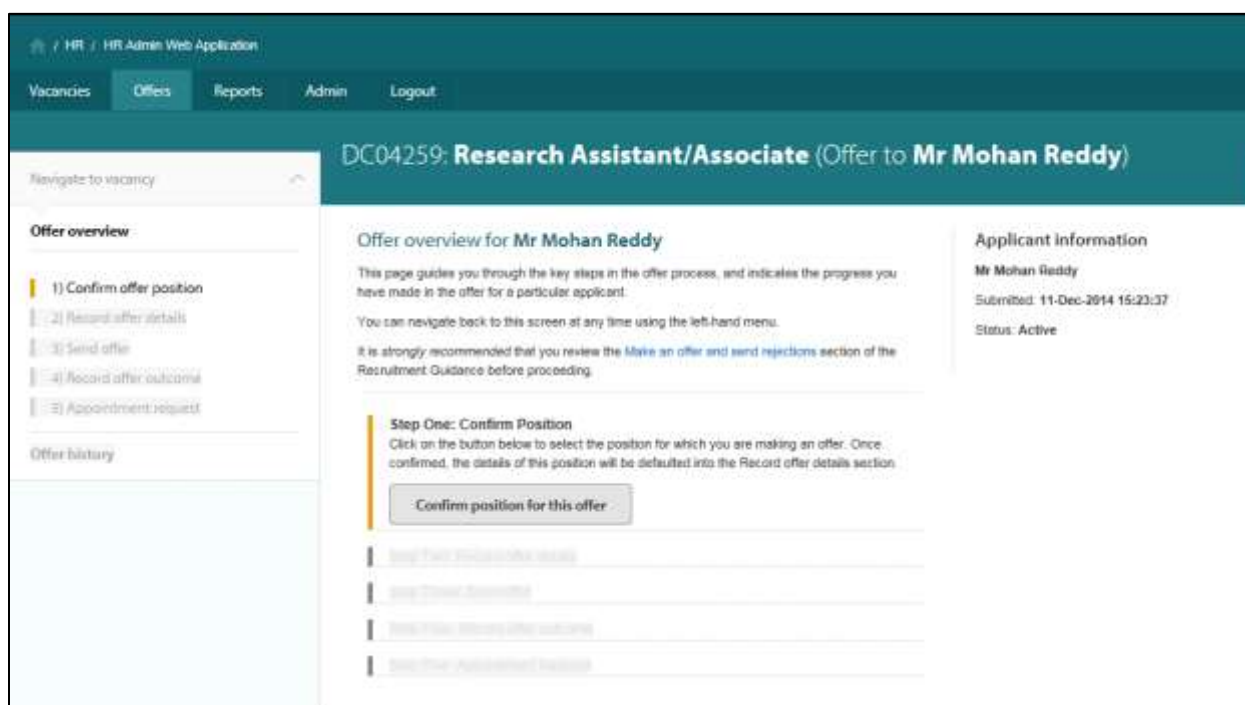


Then click on the **Change applicant stage** button.

The applicant will be moved out of the Offers tab and will appear back in the stage you have selected.

5. Managing Offers

ADMIN users should record the offer details using the six step offer process.



You will be required to:

- Confirm the position you are appointing to;
- Record the details of the offer that you are making;
- Select whether to create a system-generated offer letter or to prepare the offer letter outside of Web Recruitment and upload it;
- Confirm details of how, when and by whom the offer letter was sent (for both manual and system generated letters);
- Record the offer outcome;
- Record additional details in order to submit an Appointment Request to the HR New Appointment Team within the system.

The [Managing Offers Guide](#) explains this process in detail.

The system will guide you through the stages in order to that the next stage becomes available at the appropriate point in the process.



Note: You should use the six step offer process wherever it is possible for you to do so. You will then no longer need to transfer the applicant to the CHRIS Recruitment Module, record details of the offer there or use the CHRIS10/10A form.

6. Completing Recruitment for a Vacancy

A vacancy should be marked as recruitment complete when:

- A recruitment process has been successful, all unsuccessful applicants have been rejected and all successful applicants have been transferred to CHRIS from the offers stage in Web Recruitment; OR
- The recruitment process was unsuccessful and no successful candidates were taken forward from one of the selection stages.

Marking a vacancy as complete will perform a number of actions within the system to benefit departments/institutions. A vacancy marked as complete will:

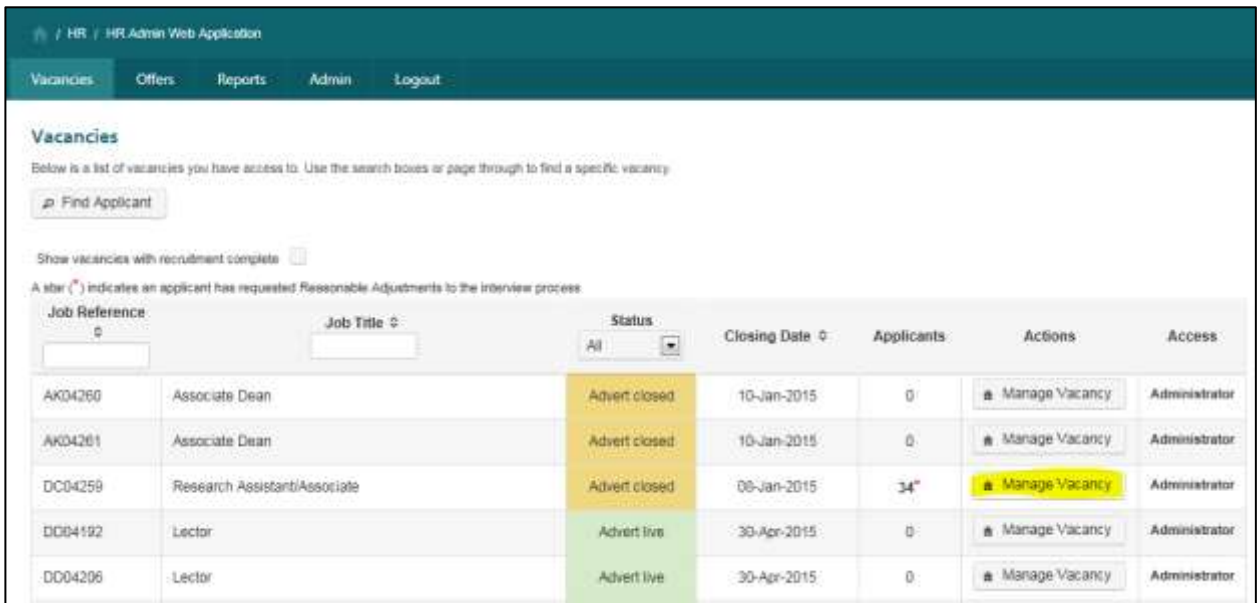
- Be purged of applicant identifiable data automatically 12 months after the closing date in accordance with the [University's recruitment document retention policy](#) (unless a the successful applicant required a Tier 2 CoS or the standard purging schedule has been overridden with approval from HR);
- Have any successful candidate information saved as a PDF snapshot for future use;
- Not appear in a user's list of vacancies (unless a user actively chooses for complete vacancies to be displayed), making the screen less cluttered.




Note: It is very important that you do mark a vacancy as complete within 12 months of the closing date for online applications. Otherwise, you may cause us to retain recruitment documentation for longer than is permitted.

8.1 Completing Recruitment for a Vacancy

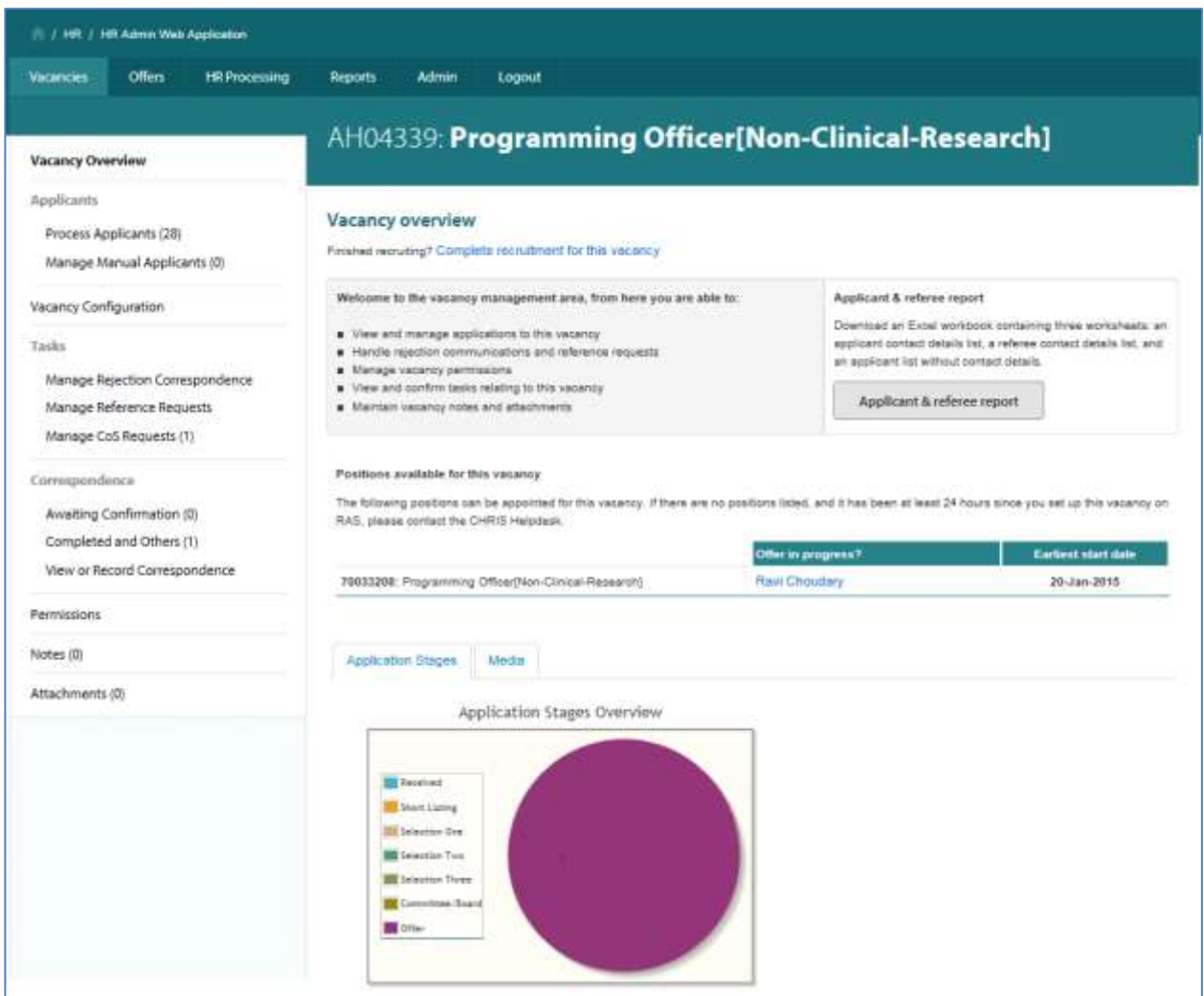
- 1) In order to complete recruitment on a vacancy, select the vacancy and click on **Manage Vacancy**.



Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AK04260	Associate Dean	Advert closed	10-Jan-2015	0	Manage Vacancy	Administrator
AK04201	Associate Dean	Advert closed	10-Jan-2015	0	Manage Vacancy	Administrator
DC04259	Research Assistant/Associate	Advert closed	08-Jan-2015	34*	Manage Vacancy	Administrator
DD04192	Lector	Advert live	30-Apr-2015	0	Manage Vacancy	Administrator
DD04206	Lector	Advert live	30-Apr-2015	0	Manage Vacancy	Administrator

 **Note:** Recruitment can only be completed for a vacancy when the vacancy closing date has passed (i.e. the Job Opportunities advert has closed).

2) The vacancy overview screen will be displayed:



The screenshot displays the 'Vacancy Overview' page for AH04339: Programming Officer[Non-Clinical-Research]. The page includes a navigation menu with options like 'Vacancies', 'Offers', 'HR Processing', 'Reports', 'Admin', and 'Logout'. The main content area features a 'Vacancy overview' section with a 'Finished recruiting? Complete recruitment for this vacancy' link. Below this, there are sections for 'Welcome to the vacancy management area', 'Applicant & referee report', and 'Positions available for this vacancy'. A table lists the available positions, including one for '79033208: Programming Officer[Non-Clinical-Research]' with 'Ravi Choudary' as the name and '20-Jan-2015' as the earliest start date. At the bottom, there is an 'Application Stages Overview' pie chart showing the distribution of applications across various stages.

Offer in progress?	Earliest start date	
79033208: Programming Officer[Non-Clinical-Research]	Ravi Choudary	20-Jan-2015

3) Whenever it is appropriate to complete recruitment on a vacancy, a link will be displayed on the overview screen. Click on the **Complete recruitment for this vacancy** link.

The following message will be displayed:

Completion of activity in Web Recruitment

i 1 applicant has been requested to be appointed.
Please remember to send any outstanding appointment paperwork to the New Appointment team.


Do you want to complete recruitment for the vacancy KA00424: Research Associate?

I confirm recruitment activity for this vacancy is now complete within Web Recruitment. I understand this will make the vacancy read-only, and that this action is not reversible.

4) Tick the confirmation box then click on ‘**Yes, complete recruitment**’.

Are you sure you want to complete recruitment for the vacancy AH04339: Programming Officer[Non-Clinical-Research]?

I confirm recruitment activity for this vacancy is now complete within Web Recruitment. I understand this will make the vacancy read-only, and that this action is not reversible.

 Note: If you have any outstanding actions on the vacancy, the system will display messages to indicate what these are (e.g. an applicant at offer stage where an Appointment Request has not yet been made or correspondence tasks awaiting confirmation). You will need to address these before completing recruitment.

8.2 Handling outstanding tasks awaiting confirmation

You will not be able to complete a vacancy with any form of task awaiting confirmation. Tasks can be of two types:

- Rejection task;
- Reference task.

The following sections describe the options for handling these two types of outstanding task.

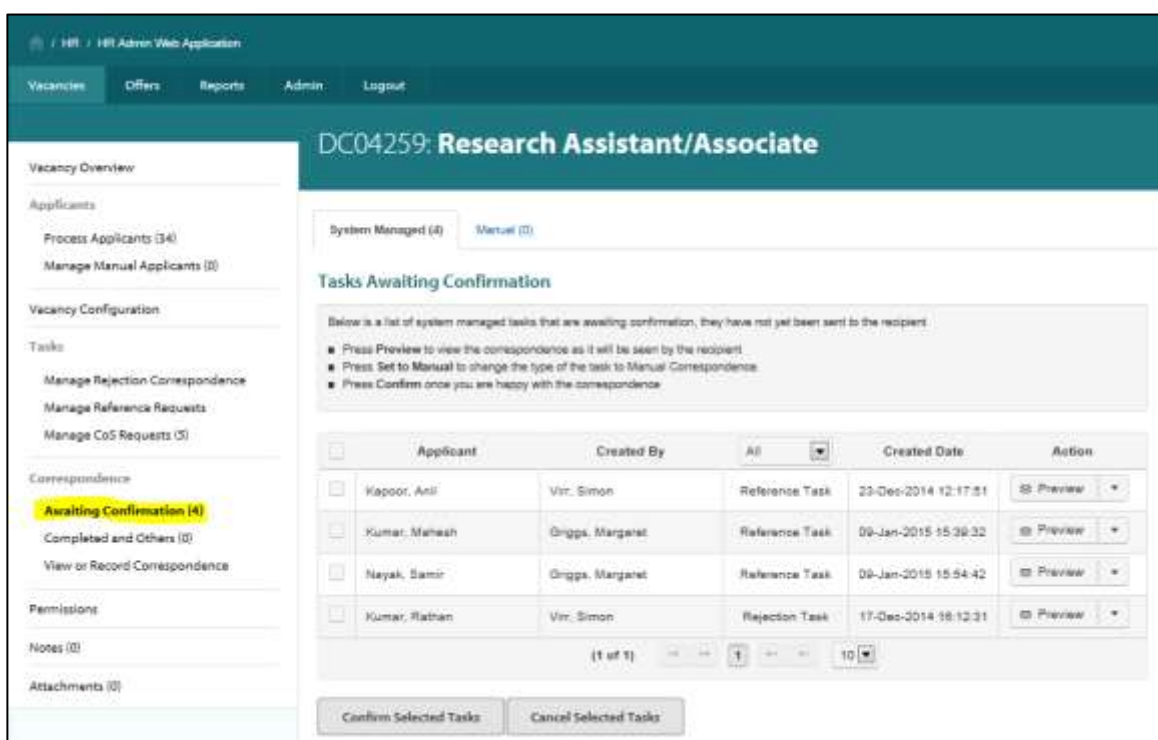
Both types of tasks can be either cancelled or reverted back to manual (meaning that you will manage the correspondence outside of the system). The following sections provide an overview of the processes. Please see the guide to ‘[Generating Correspondence](#)’ within Web Recruitment for more details of how to deal with tasks awaiting confirmation.

Note: If you sent rejection correspondence or a reference request outside of the system, ideally you should revert the outstanding tasks to manual and record the method you used for the correspondence. This has the advantage of providing a clear and complete audit trail should any queries/issues arise in the future, or in the event of a recruitment internal audit.

8.2.1 Cancelling a correspondence task

Please note that, before you follow the instructions below, you should ensure that the vacancy configuration information is complete. Please see the guide to **Generating Correspondence** within the [Web Recruitment document library on the HR Systems web pages](#) for more details.

If you wish to cancel either type of correspondence task, you can do this from the **Correspondence Awaiting Confirmation** menu option on the left menu bar:



- 1 Tick the check box next to the task you wish to cancel and click on **Cancel Selected Tasks**.

System Managed (2)
Manual (1)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

	Applicant	Created By	All	Created Date	Action
<input checked="" type="checkbox"/>	Kapoor, Anil	Virr, Simon	Reference Task	23-Dec-2014 12:17:51	Preview
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview

(1 of 1)
<< < > >>
1
>> >>>
10

Confirm Selected Tasks
Cancel Selected Tasks

2 You will be asked to confirm the cancellation.

Confirm Cancellation

Are you sure you want to **cancel** the selected tasks ?

Note: For Rejection Tasks, the status of the associated candidates will remain as **Rejected**

Yes
No

3 When you refresh the screen, the task will have been removed.

System Managed (1)
Manual (1)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

	Applicant	Created By	All	Created Date	Action
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview

(1 of 1)
<< < > >>
1
>> >>>
10

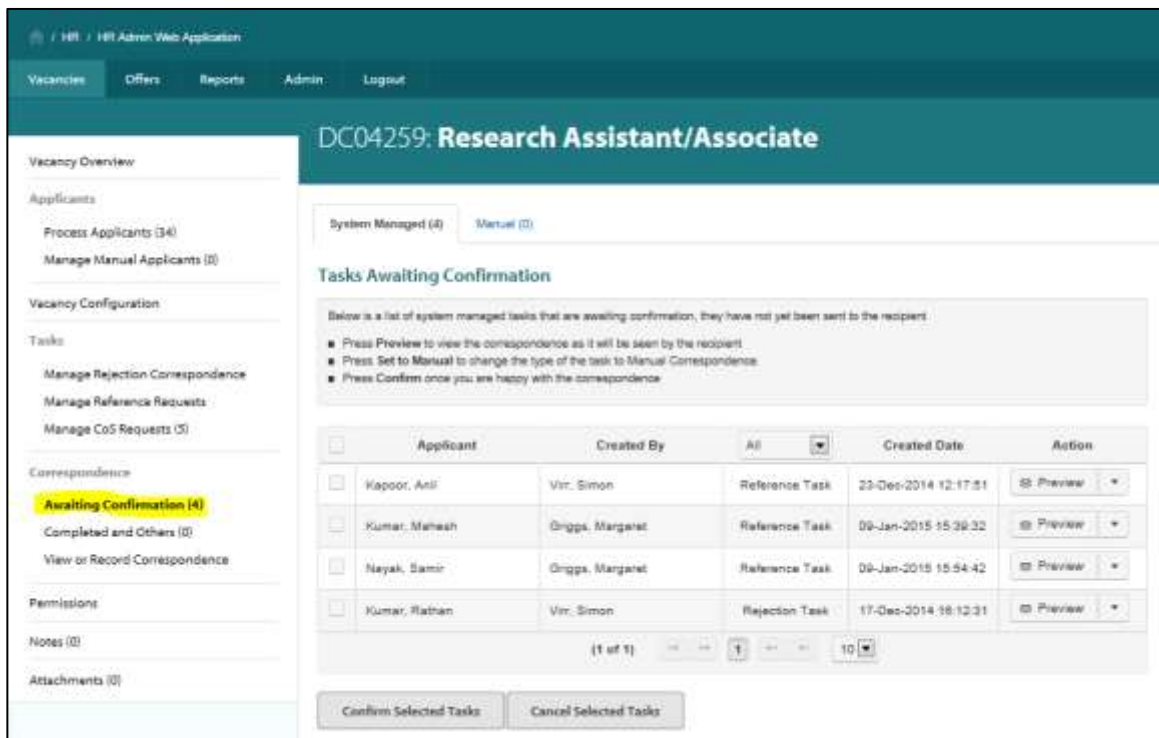
Confirm Selected Tasks
Cancel Selected Tasks

Note: If you chose to cancel automated rejection or reference tasks, you should keep your own records of what you sent to the applicant/ referee.

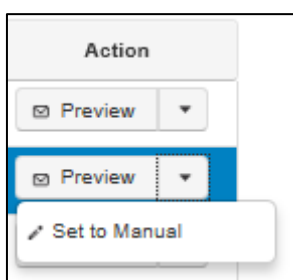
8.2.2 Switching a correspondence task back to manual

Please note that before you undertake this task you should ensure that the vacancy configuration information is complete. Please see the guide to **Generating Correspondence** within the [Web Recruitment document library on the HR Systems web pages](#) for more details.

If you wish to switch any type of automated correspondence task back to manual you can do this from the **Correspondence Awaiting Confirmation** menu option on the left menu bar.



- 1 Tick the check box next to the relevant task and click on **Set to Manual** using the option on the **Action** menu.



- 2 You will be asked to confirm the action:

Confirm Action

Are you sure you want to set this task to **Manual** ?

3 When you refresh the screen, the task will then be shown under the **Manual** tab so that you can record the manual correspondence that you have sent/decided to send.

System Managed (2)
Manual (1)

Manual Tasks Awaiting Confirmation

Below is a list of manual tasks that are awaiting manual correspondence to be recorded

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to System Managed** to change the type of the task to System Managed
- Press **Confirm** once you are happy with the correspondence

	Applicant	Created By	All	Created Date	Action
<input type="checkbox"/>	Kumar, Mahesh	Griggs, Margaret	Reference Task	09-Jan-2015 15:39:32	Record Correspondence

(1 of 1) << 1 >>

Mark As Complete
Cancel Selected Tasks

Once you have reverted a task to manual, you are strongly advised to record details of:

- Any manual rejection letters/ emails sent to the applicant;
- The manual reference request sent to the referee; and
- The manually returned reference from the referee.

Please see the guide to **Generating Correspondence** within the [Web Recruitment document library on the HR Systems web pages](#) for more details.

7. Purging of Applicant Identifiable Data

The Web Recruitment System aims to make it as easy as possible for departments/institutions to comply with the University's existing [retention policy for recruitment documentation](#), whilst maintaining some flexibility and the ability to generate recruitment management information in the long-term.

Once you have [marked a vacancy as complete](#), it will normally be subject to automatic purging by the system 12 months after the vacancy's closing date for online applications. This means that data which makes it possible to identify individual unsuccessful applicants will be removed but anonymised details (including equal opportunities information) will be retained so that it is still possible to generate reports and undertake trend analysis (for example, for Athena SWAN or equal opportunities monitoring purposes). Details of the successful applicant, including their application, will be retained.

The exception to this purging schedule is where the successful applicant for a vacancy requires a Tier 2 CoS. In these circumstances, immigration rules require us to retain recruitment documentation for 12 months or until a UKVI compliance officer has examined and approved them, whichever is the longer period. The system will recognise vacancies where a CoS request has been made. It will ensure that they are not purged 12 months after the closing date but retained until UKVI compliance officer has audited them.

You will be reminded in advance when a vacancy is approaching 12 months after its closing date and is eligible for purging. This will be done through on-screen messages.

If at this point, or any earlier in the recruitment process, you are aware of a legitimate and compelling reason (e.g. ongoing legal proceedings) why the vacancy should not be subject to the normal purging rules, you must speak with the relevant HR Business Manager or the Head of Recruitment. Having considered the data protection implications of your request, he/she will be able to authorise an exception being made and you will then be able to ask the CHRIS Helpdesk to mark the vacancy as a purging exception.



8. Exceptions to the 'Standard' Process

10.1 Studentships

Please note that studentships should not be made available to receive applications using the Web Recruitment System. Studentships are not employment contracts and using a system designed for recruiting employees may cause confusion on this matter.

10.2 Applicants sourced through agencies

Where you have decided to use a recruitment agency to source applicants, this should be handled as follows:

- Where you are using an agency, as well as advertising the vacancy on the University's Job Opportunities pages and accepting direct applications – any applicants forwarded to the appointing body for consideration should have their details entered into the Web Recruitment System using the manual application entry process described in the section on [adding an applicant to a vacancy](#). Applications sifted out by the agency, which the University does not see/review, do not need to be recorded in the system.
- Where you are using an agency as the only means of sourcing your applicants and are not accepting direct applications through the Web Recruitment System, it will not be possible to record details of the applications forwarded by the agency in the system. Instead, applicants forwarded to you should be asked (by the agency) to complete a CHRIS/5 or CHRIS/6 form (as applicable). These should be handled as described in the Recruitment Guidance at: <http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning/determine-application-method>.
- In order that the University's equal opportunities data is complete, please provide details of the applicants' equal opportunities information as described in the information found at: <http://www.hr.admin.cam.ac.uk/recruitment/step-3-recruit-and-select/close-selection-process>.