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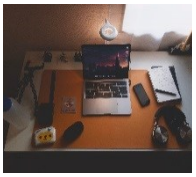

Web Recruitment Release 5, March 2019

Managing Vacancies and Applicants

HR Systems

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1. Introduction

1.1 Overview of recruitment-related systems and Web Recruitment

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

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

- Find the details of a vacancy which exists in CHRIS (posts which have been graded following receipt of a role profile or are being refilled); or
- "Clone" (make a copy of) an existing assistant or academic-related post; 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 that they will be inviting online job applications via the Web Recruitment System. 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.

  Please see the Recruitment Administration System (RAS) User Manual for further details. This can be found on the HR Systems Landing pages at: https://www.hrsystems.admin.cam.ac.uk/systems/systems-overview/recruitment-administration-system-ras

The Web Recruitment System can then be used to receive and process applications received including managing and recording the results of the selection process, generating rejection emails and reference requests, recording offer details and producing an offer letter to the successful applicant and submitting an electronic Appointment Request to the HR New Appointment Team so that they can transfer details of the applicant and appointment into CHRIS.

Even if you do not use the Web Recruitment System to receive and process applications, it can still be used to submit an electronic Appointment Request, avoiding the need for a CHRIS/10 or CHRIS/10A form.1.2 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 hrnewappointmentteam@admin.cam.ac.uk.

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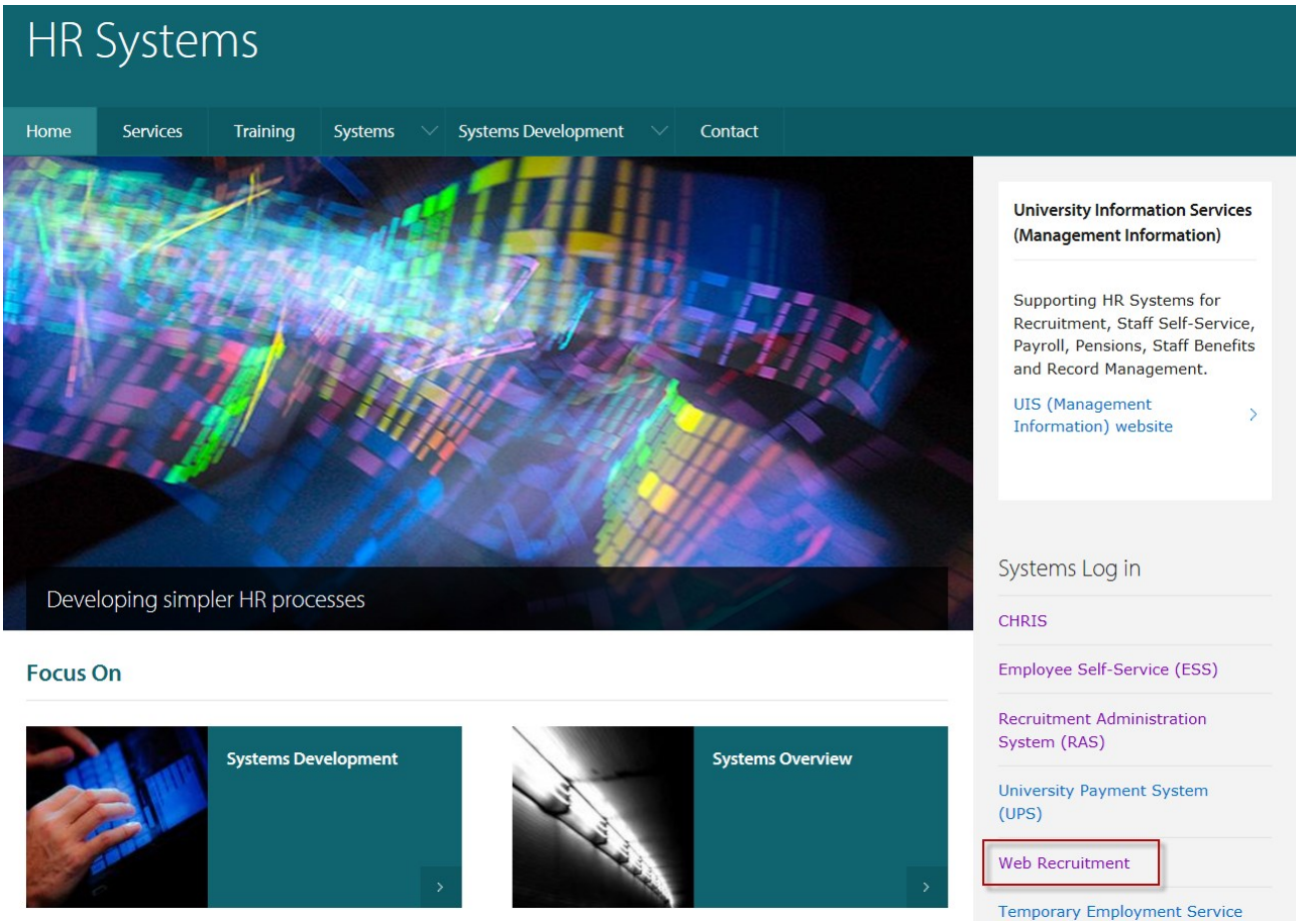
2. Logging In and Locating a Vacancy or an Applicant

2.1 Logging in to Web Recruitment

The system can also be accessed from the HR Systems landing pages at:

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



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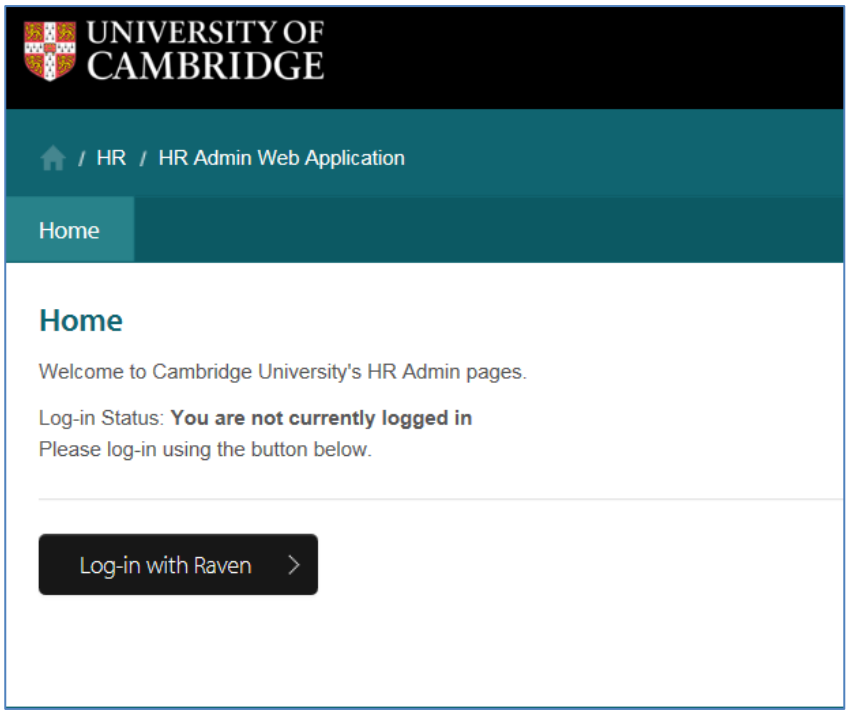
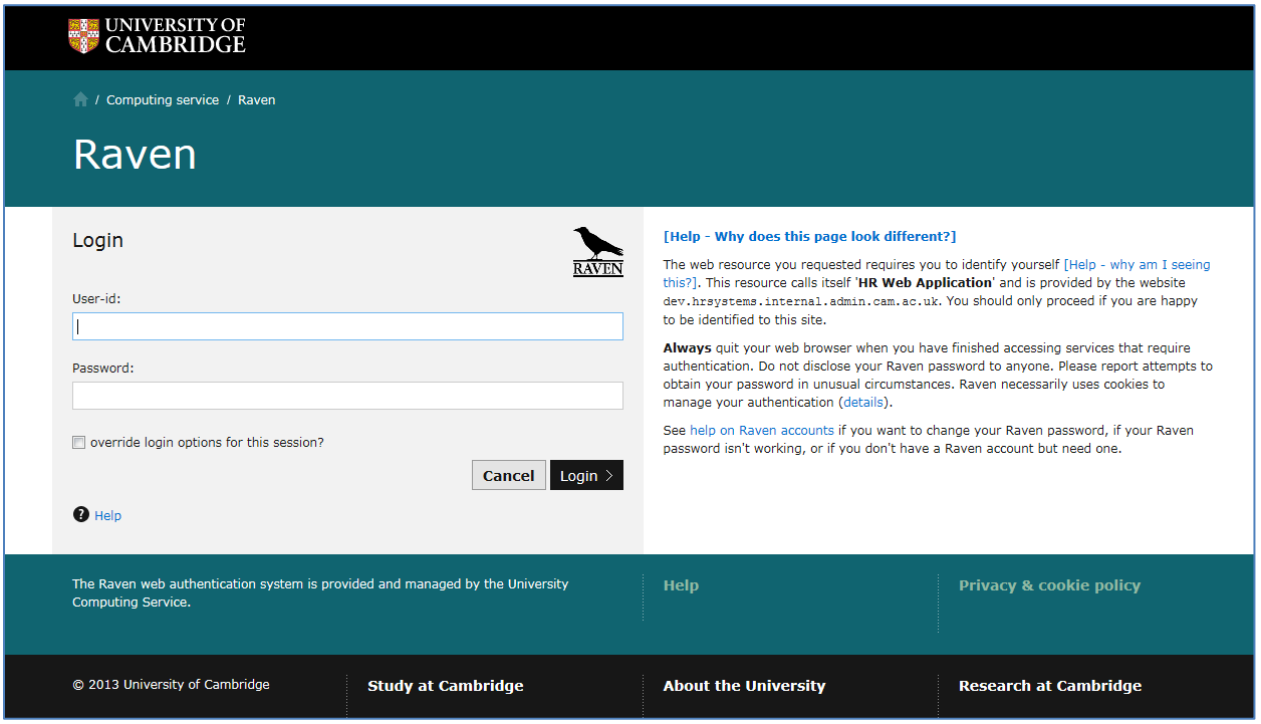
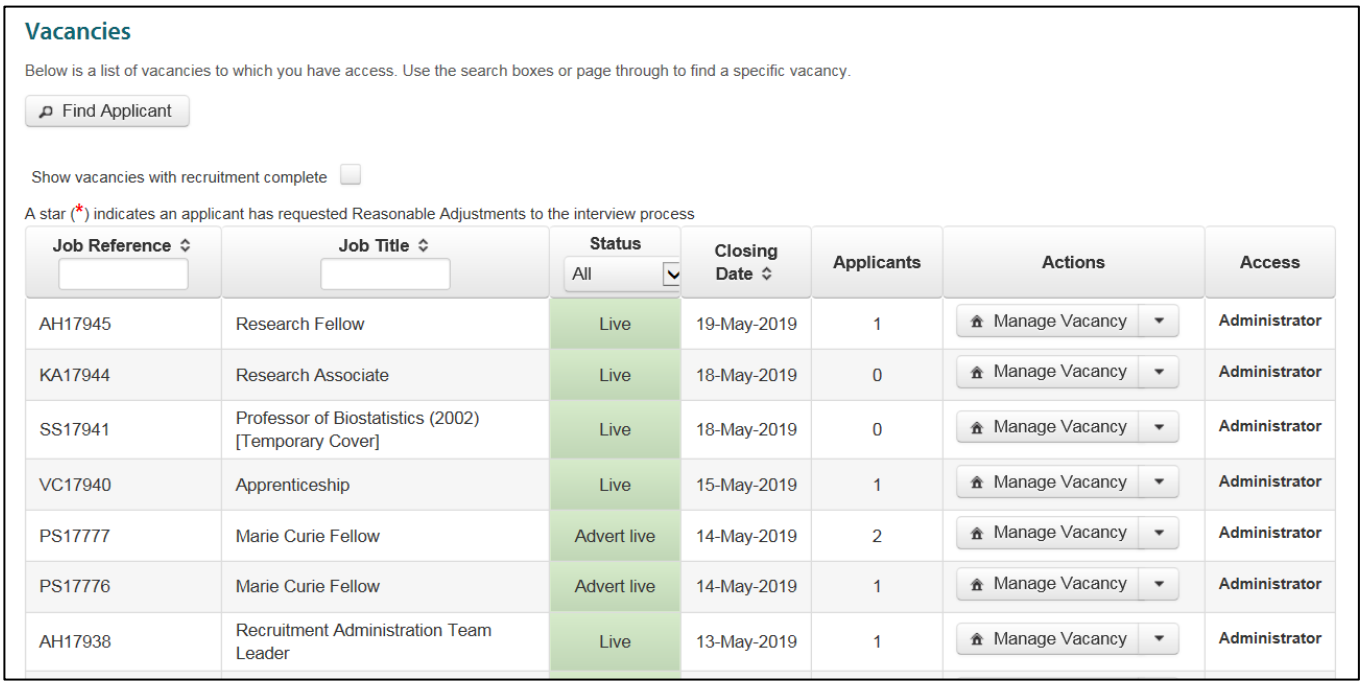
1. Click on the link **Log-in with Raven** button to access the system.



2. Enter your Raven user-id and password.



The system will then display the vacancies for which you have permission.



Vacancies

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

Find Applicant

Show vacancies with recruitment complete

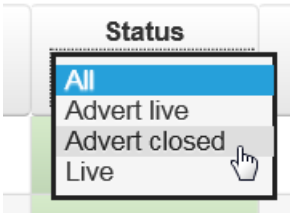
A star (*) indicates an applicant has requested Reasonable Adjustments to the interview process

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AH17945	Research Fellow	Live	19-May-2019	1	Manage Vacancy	Administrator
KA17944	Research Associate	Live	18-May-2019	0	Manage Vacancy	Administrator
SS17941	Professor of Biostatistics (2002) [Temporary Cover]	Live	18-May-2019	0	Manage Vacancy	Administrator
VC17940	Apprenticeship	Live	15-May-2019	1	Manage Vacancy	Administrator
PS17777	Marie Curie Fellow	Advert live	14-May-2019	2	Manage Vacancy	Administrator
PS17776	Marie Curie Fellow	Advert live	14-May-2019	1	Manage Vacancy	Administrator
AH17938	Recruitment Administration Team Leader	Live	13-May-2019	1	Manage Vacancy	Administrator

2.2 How to search for a vacancy in Web Recruitment

2.2.1 Search Option 1 – By status

1. 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. The Status of “Live” is used to indicate vacancies where Web Recruitment is not being used to collect applications, but will be used to make the Appointment Request.



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.

Please see the section on completing recruitment for further details.

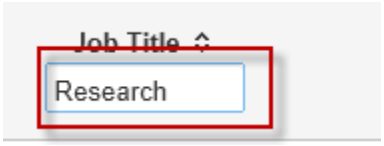
2.2.2 Search Option 2 – Using the filters

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
PE		All		
PE17855	Gardener	Advert live	11-Jun-2019	0
PE17830	Gardener	Advert live	11-Jun-2019	0
PE17810	Gardener	Advert live	11-Jun-2019	0
PE17790	Gardener	Advert live	09-Jun-2019	0
PE17926	Temporary Flower Planter	Live	08-May-2019	1
PE17927	Unestablished Plant Developer	Live	08-May-2019	1

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.

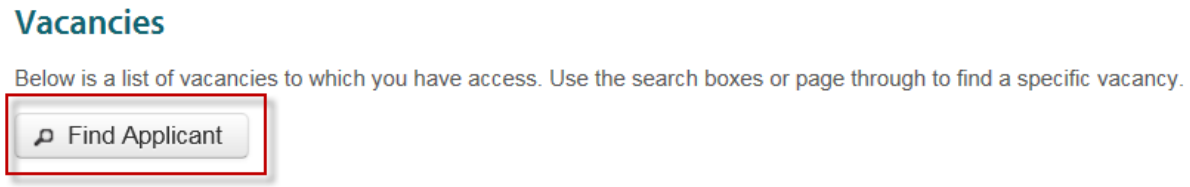


You see the screen filter automatically to provide a list all the data that meets your current search criteria.

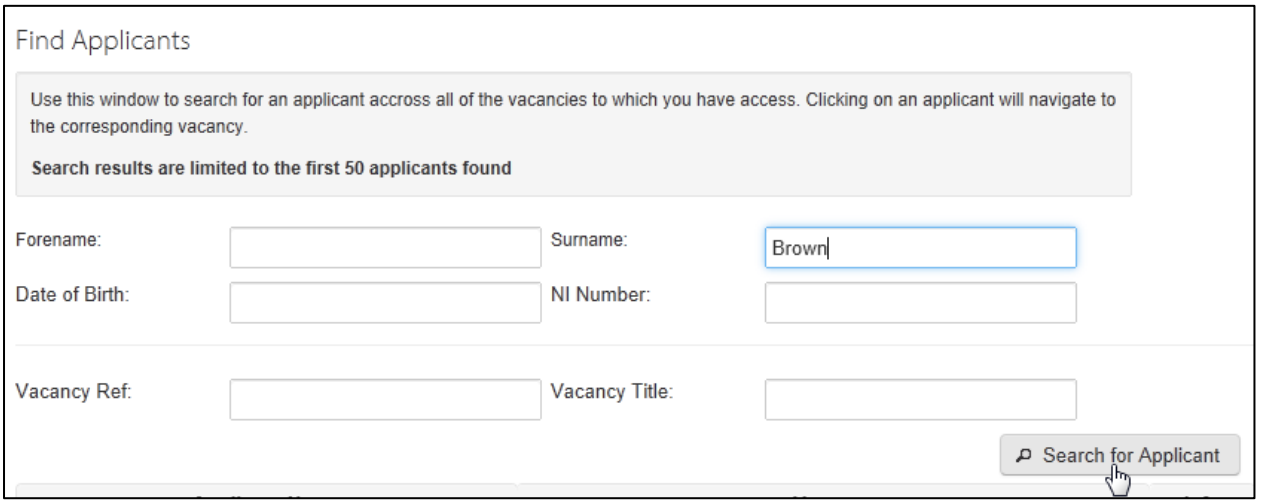
Job Reference	Job Title	Status	Closing Date
	Research	All	
AH17860	Research Fellow	Advert live	11-Jun-2019
SS17827	Senior Research Associate	Advert live	11-Jun-2019
AH17835	Research Fellow	Advert live	11-Jun-2019
SD17825	Clinical Research Associate	Advert live	11-Jun-2019
AH17820	Research Fellow	Advert live	11-Jun-2019
SB17816	Research Associate/Senior Research Associate	Advert live	11-Jun-2019

2.3 How to search for an applicant in Web Recruitment

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



2. 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.



3. The results of your search will be displayed.

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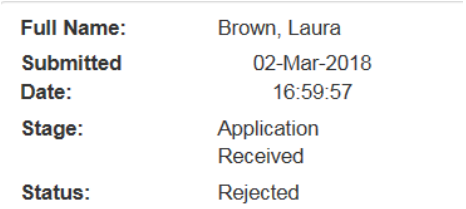
4. You can click on the 'i' icon under the Info column to review the submitted date, stage and status details of their application.



3. Managing vacancies

3.1 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, allowing you to view and process applications.

Additional access of different levels can be added using the **Permissions** function.

3.2 Giving others access to a vacancy

3.2.1 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.

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

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Role	Available actions
READ:	Has the ability to: • 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: • 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: • 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. • Receives notifications when invited applicants submit their form.

Please note that:

- Functionality for making an Offer is restricted to ADMIN users;
- The CoS request function is 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 perform vacancy configuration for correspondence.

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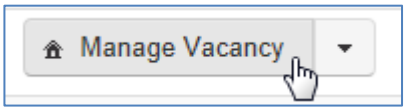
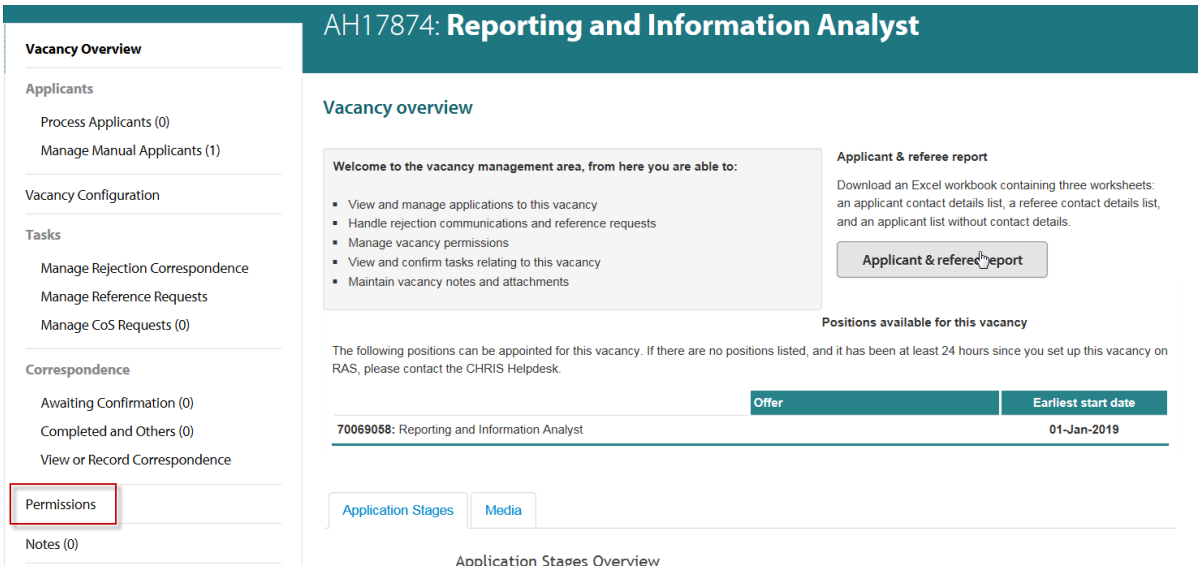
3.2.2 Assigning Access Rights

To grant other access to a vacancy you are administering:

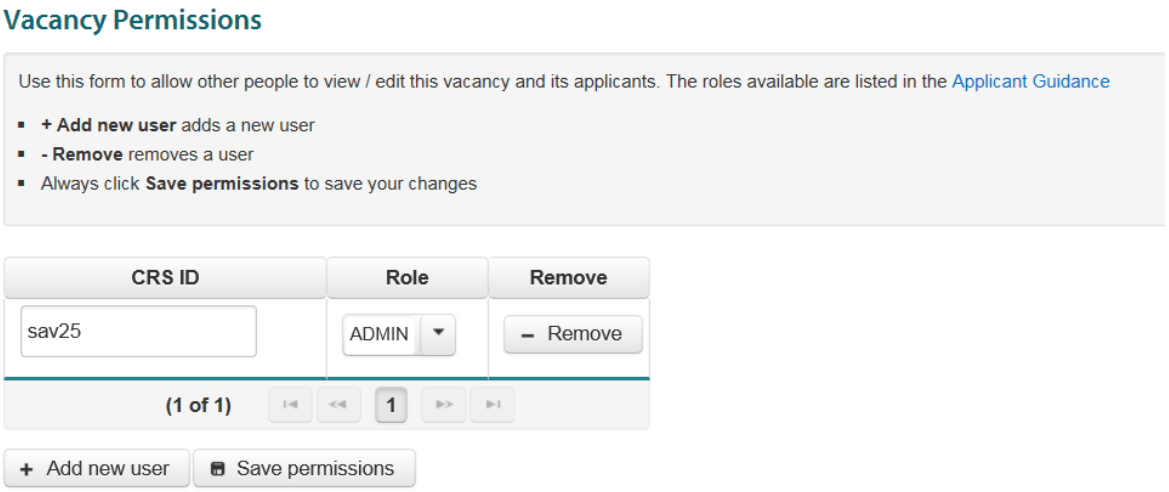
1. Click on the **Manage Vacancy** button next to the vacancy.



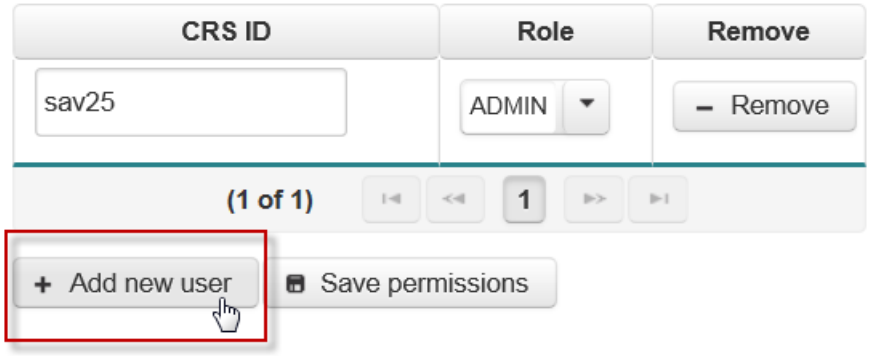
2. The **Vacancy Overview** screen will be displayed. Select **Permissions**.



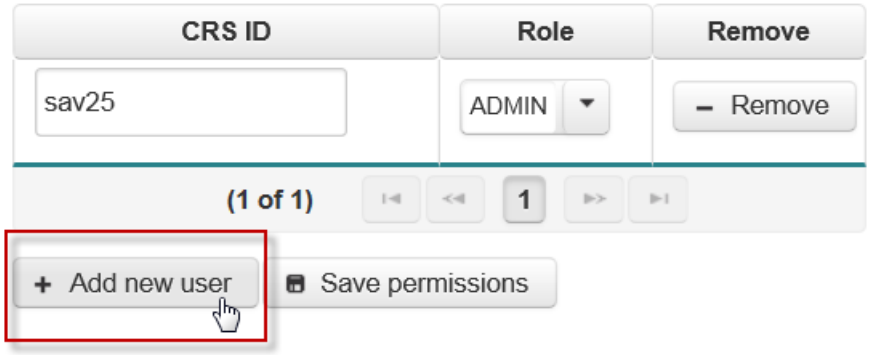
The **Vacancy Permissions** screen will be displayed:



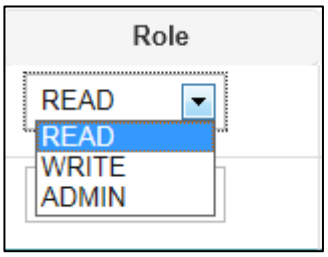
3. Click on the '**Add new user**' button.



A new row will appear as shown below.

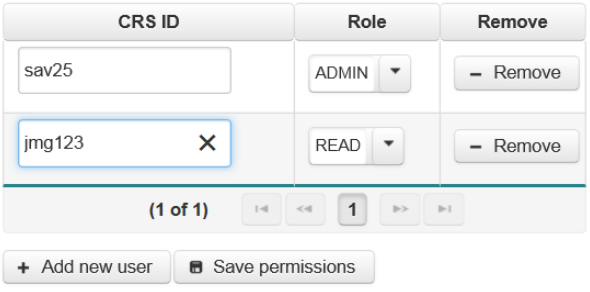


4. Add the CRS-ID (e.g. aa999) for the person you wish to give access to the vacancy and select a user role for the person.



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.



Note: The CRS-ID is checked against the CHRIS system to identify the email address for the user. If there is no email address in CHRIS you will need to get the user update their email in ESS 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 – and potentially the wrong person will be able to see the vacancy.

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 inadvisible to allow large numbers of ADMIN roles on one vacancy 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.

3.3 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).

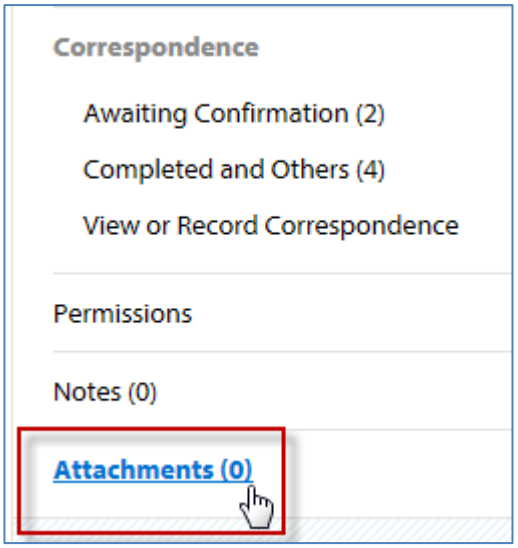
Tip: Store documents against a vacancy if they relate to the job, the recruitment process or multiple applicants. Store documents against an applicant if they relate to one applicant only.

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

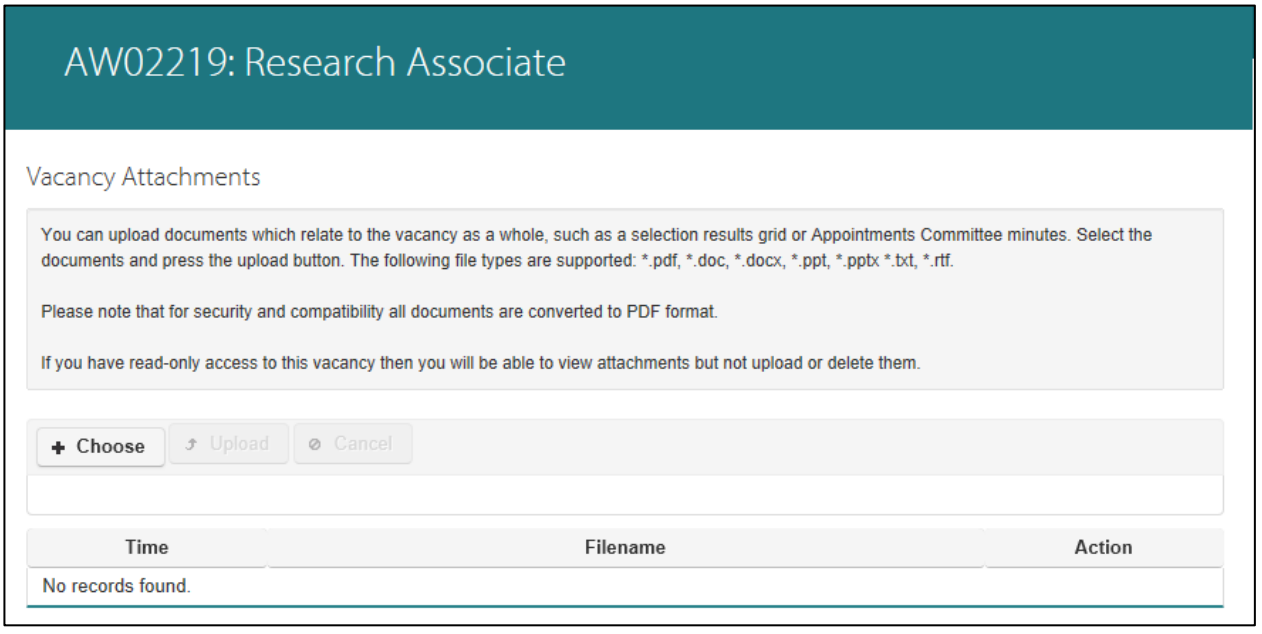
data protection (http://www.training.cam.ac.uk/cppd/event/1208963) if you have not done so already and you are going to have WRITE or ADMIN access in Web Recruitment.

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

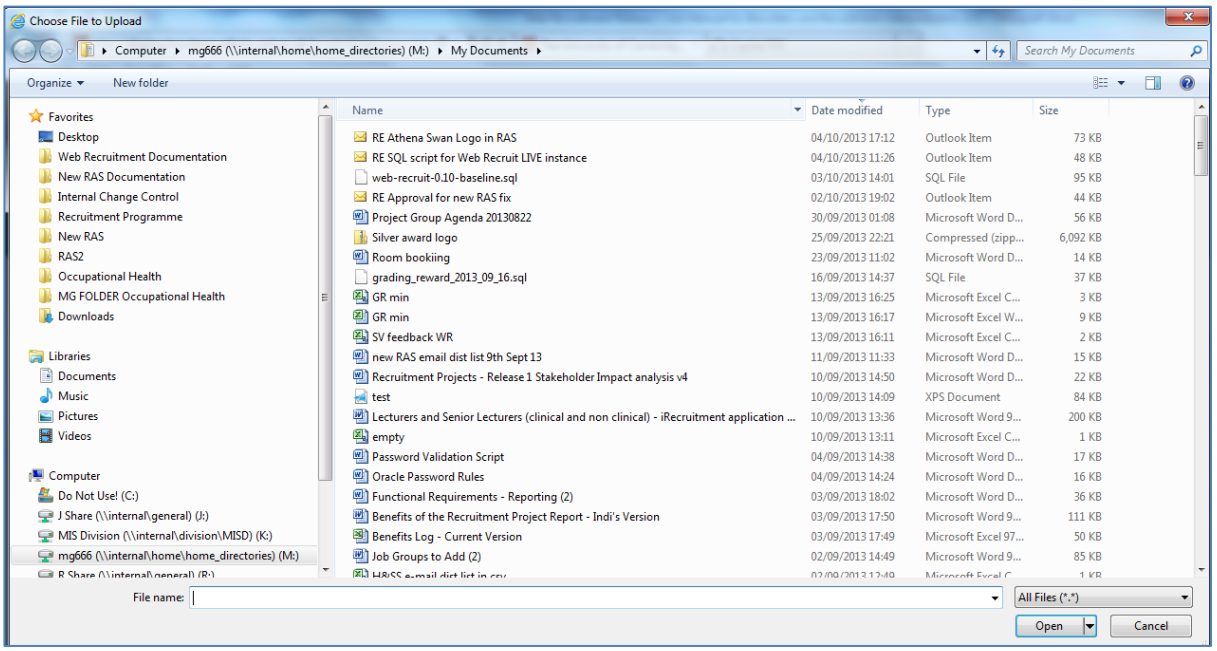
1. Click on the **Attachments** option.



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



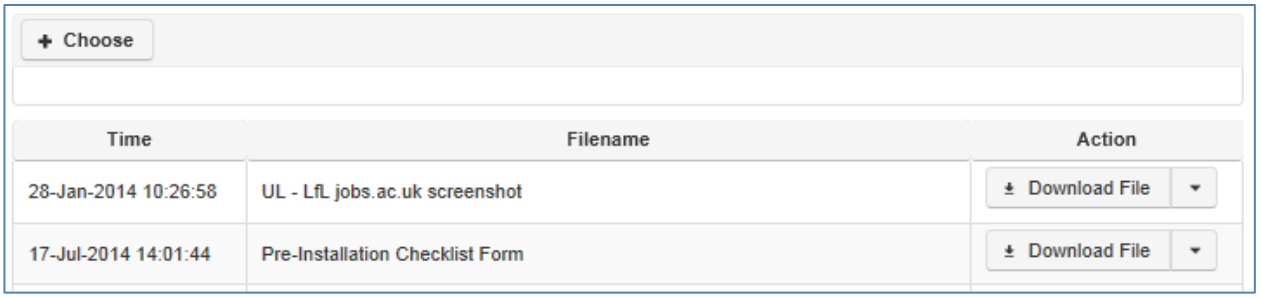
2. Click on **Choose.** Your file directory will then be displayed.



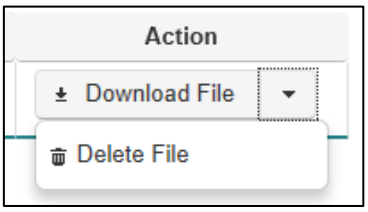
3. Select a file to be uploaded and click on **Open**.

   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.



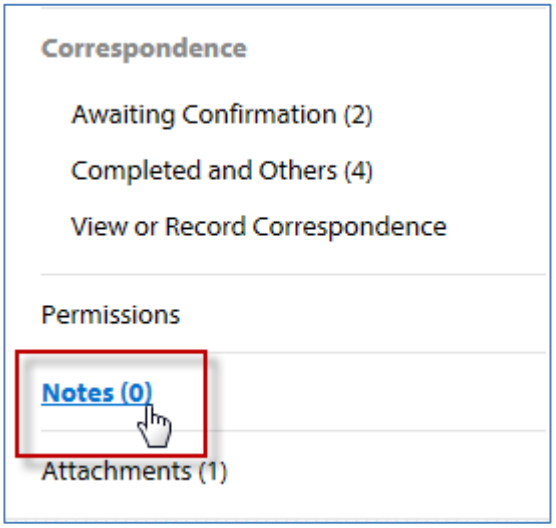
Tip: To check the file content, click the **Download File** button in the action field. To delete the document, select the **Delete File** option in the action field.



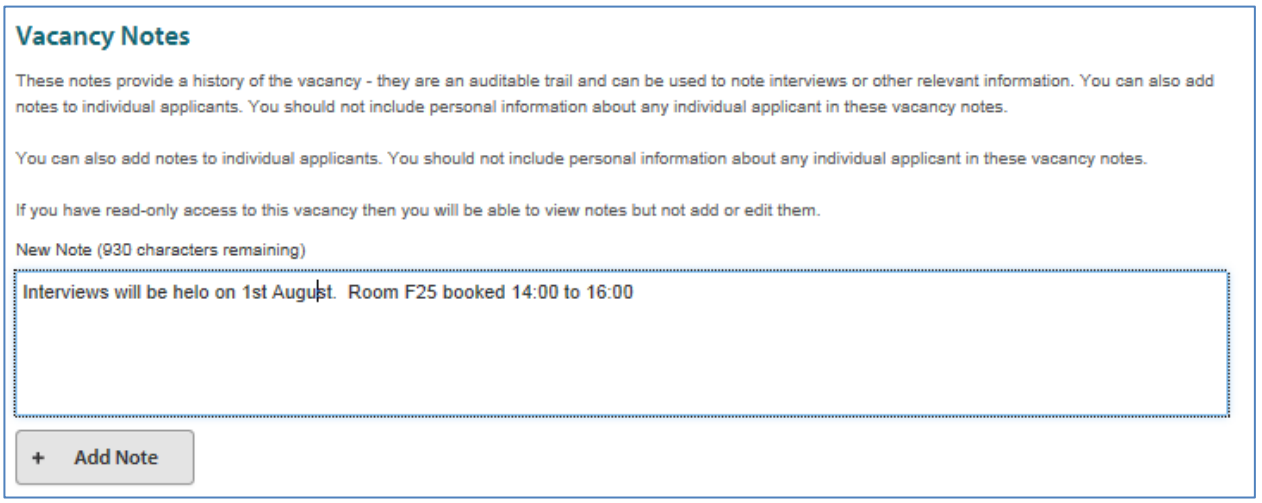
3.3.2 Recording vacancy notes

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).

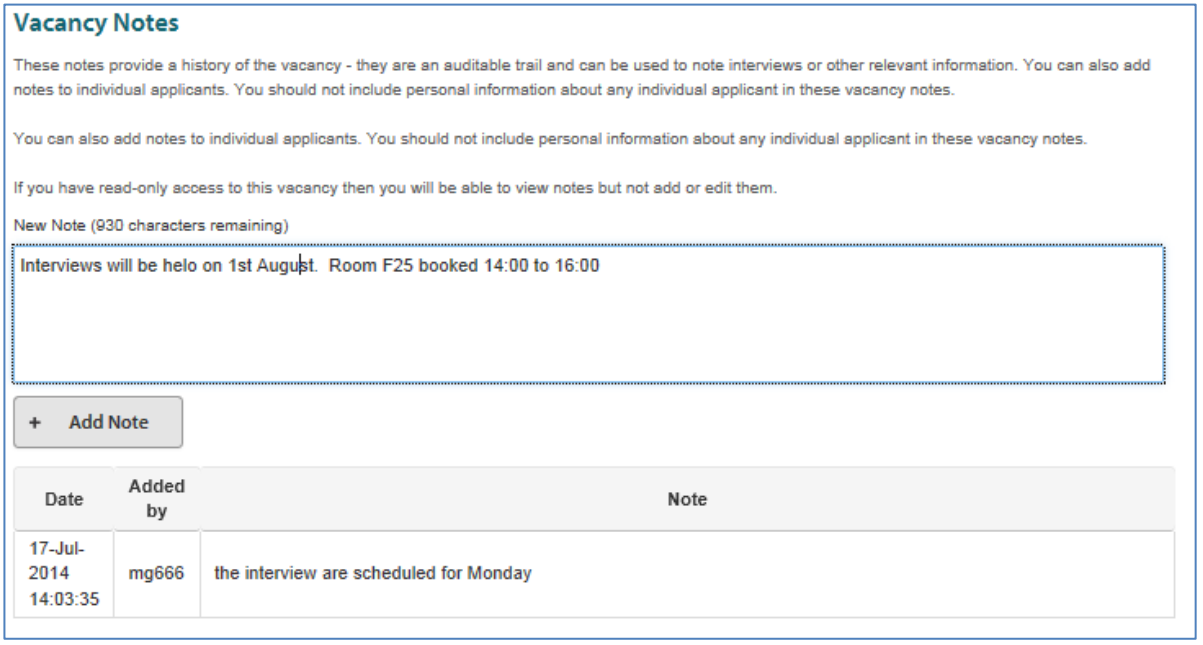
1. Click on the **Notes** option.



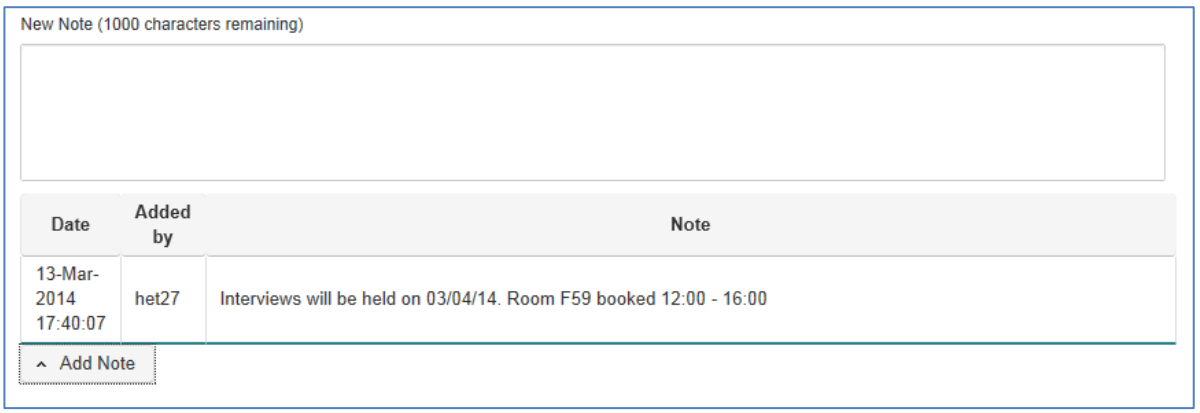
The **Vacancy Notes** screen will be displayed.



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

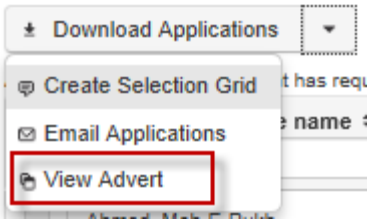


3. Click on **Add Note**. The details of your note, the date it was added and your CRS-ID will appear in the table underneath.



3.4 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 ea

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

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

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

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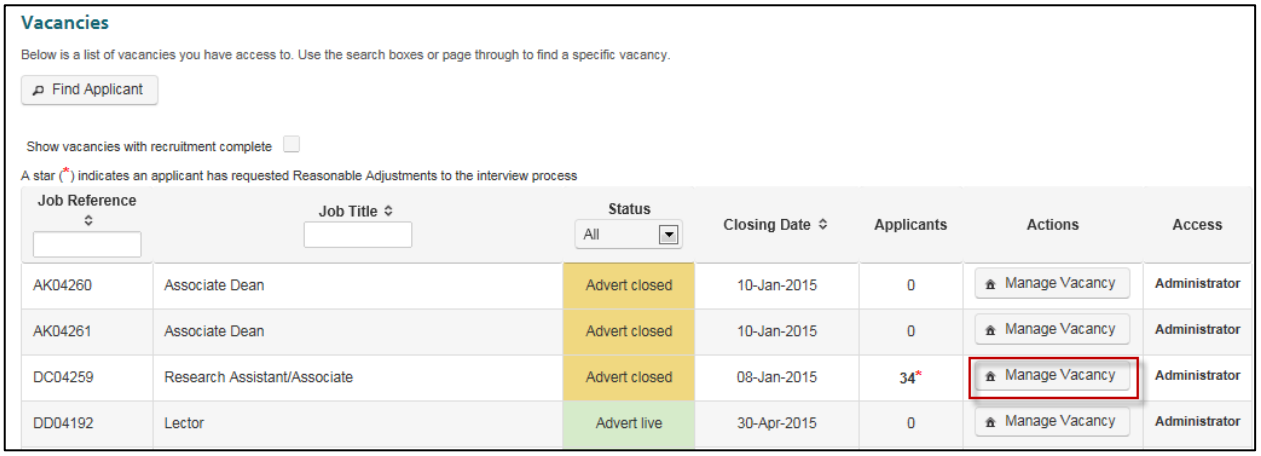
4. Managing Applicants Through the Selection Process

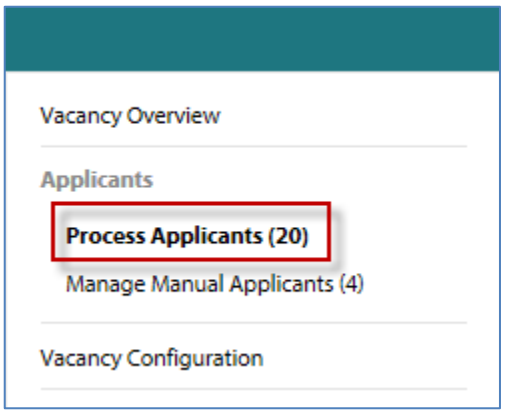
4.1 Introduction: vacancies where you are collecting applications through web recruitment

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.

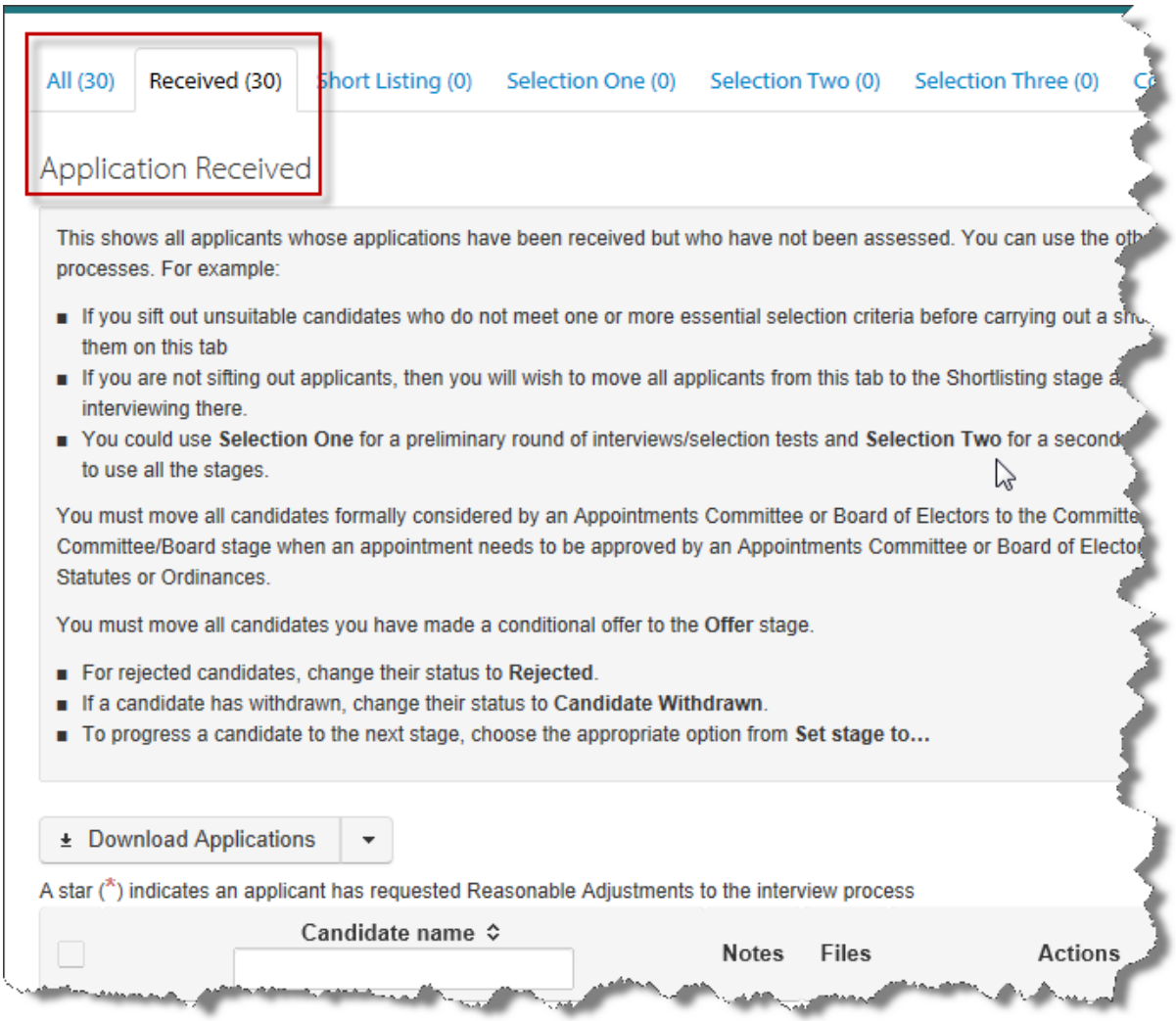
1. From the main vacancy listing screen, select the vacancy you wish to process and click on **Manage Vacancy** button.



2. Select **Process Applicants**.

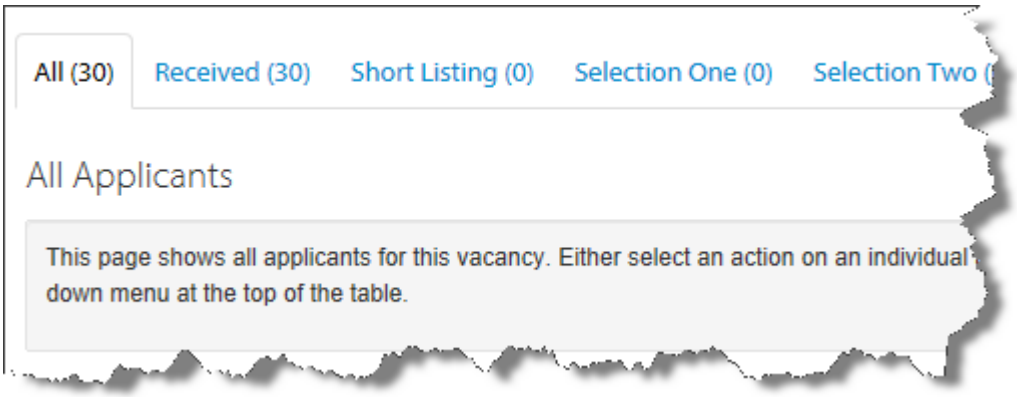


The applicants screen will be displayed with the **Received** tab selected. This shows all applications that have been received but a decision on them (e.g. that a particular application has been rejected) not yet recorded in the system.



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).



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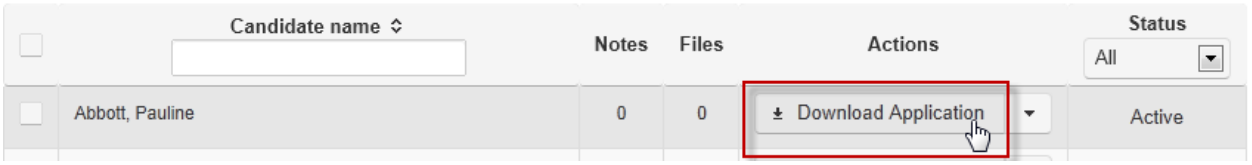
4.2 Adding, Sharing and Reviewing Applications

4.2.1 How to view PDFs of applications for a vacancy

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

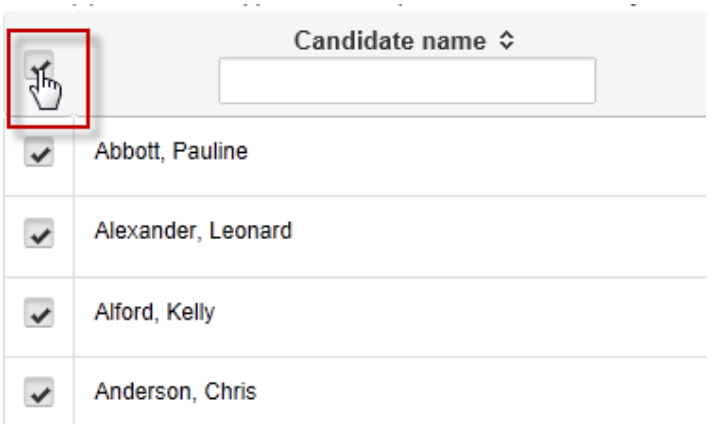
1. To view an individual application, click on **Download Application** next to the relevant applicant.



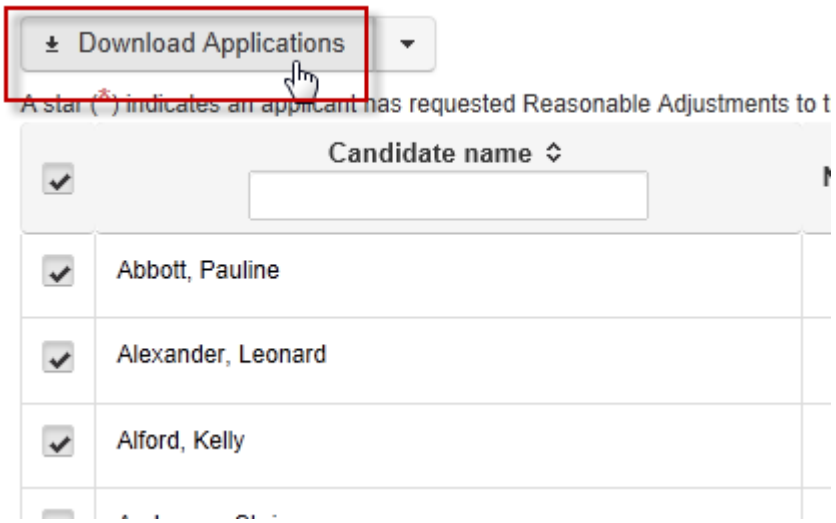
A pop-up window will appear, showing a PDF of the application(s).

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.



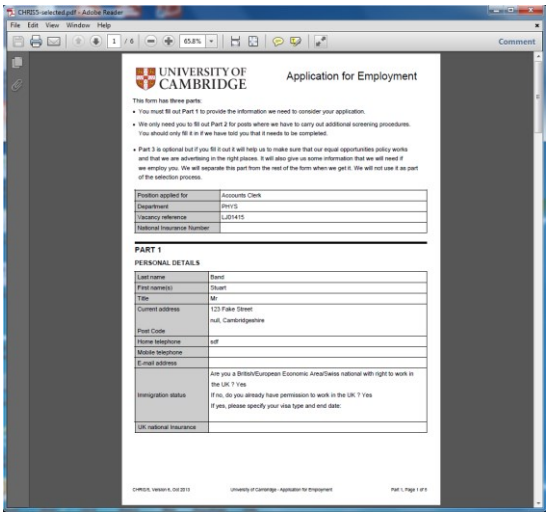
3. Click on the **Download Applications** button.

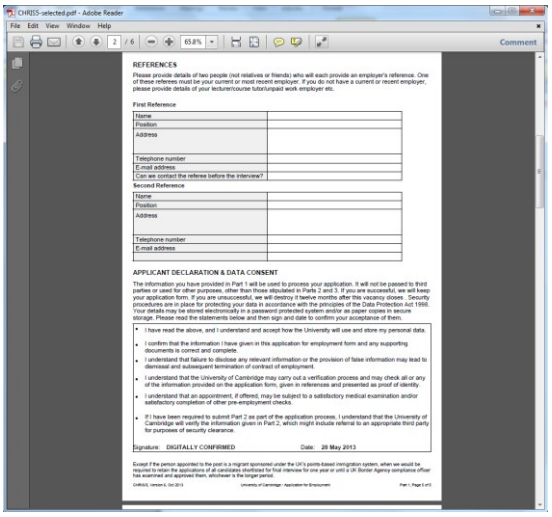


Your browser will then prompt you to save or open the pack.

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.





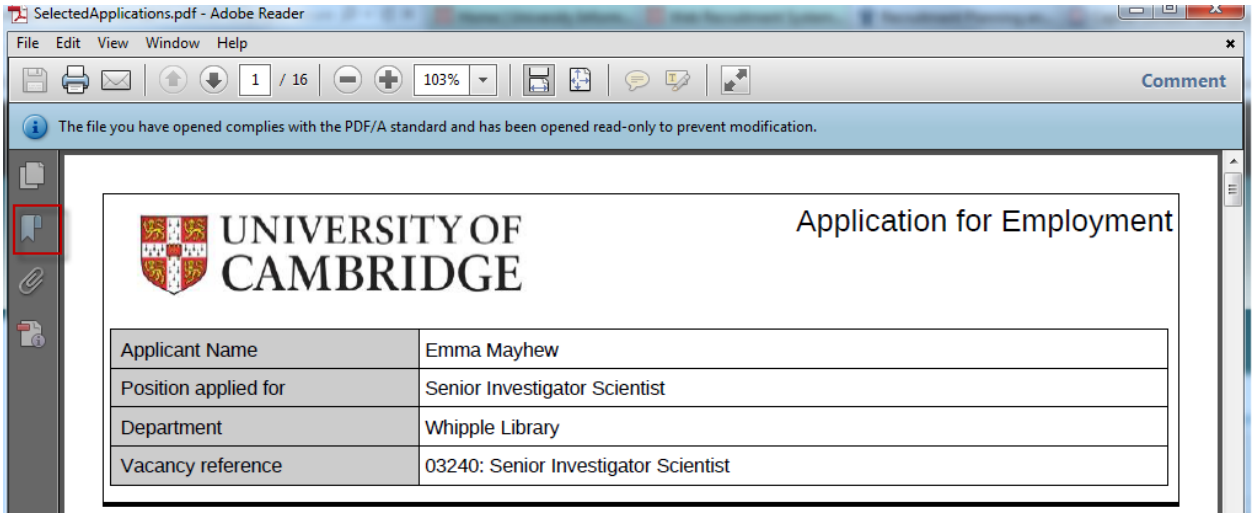
The PDF/A can be printed using **File/Print**.

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.

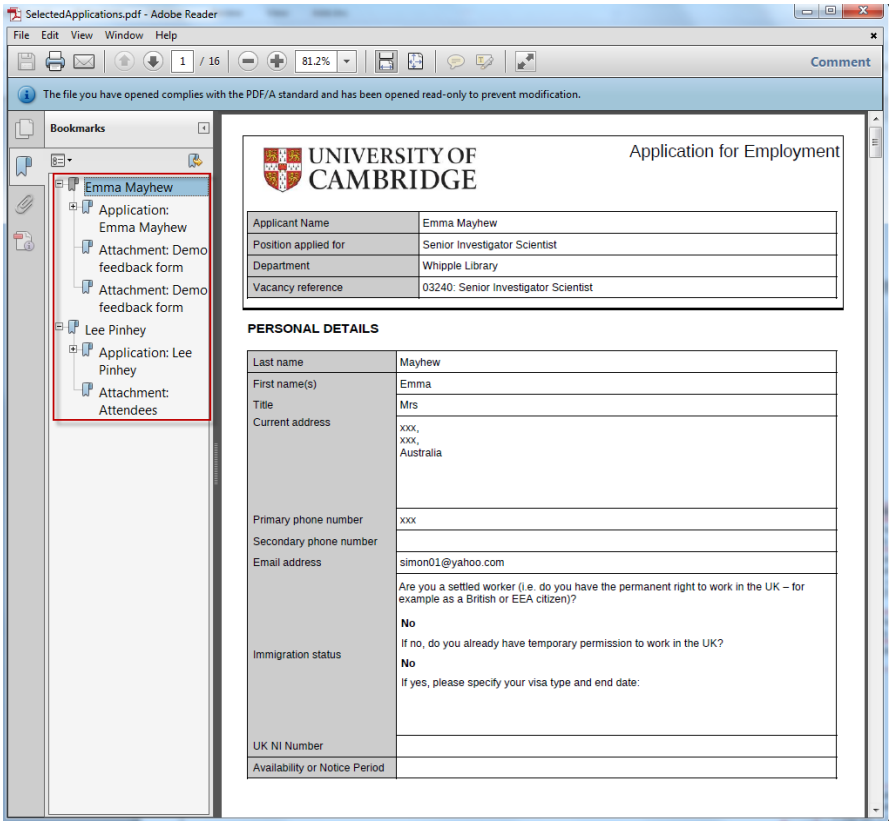
Note: If you are using Internet Explorer and experience any error messages when viewing a PDF this is likely to be due to an issue with plugins on your PC. If this

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.

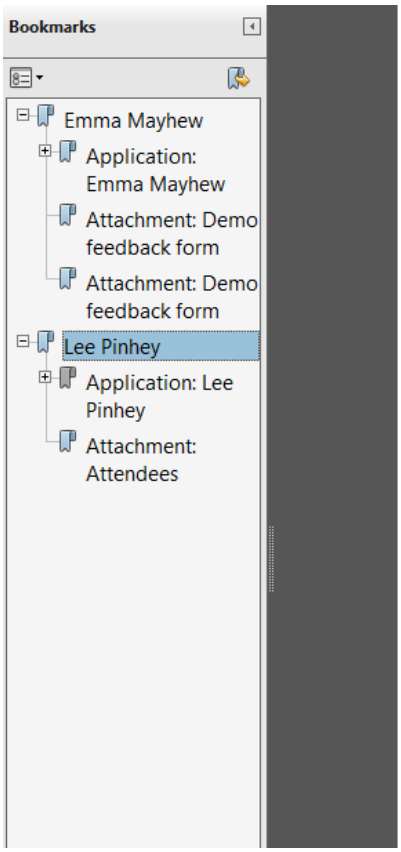
5. To look at a bookmarked version of the PDF, click on the bookmark icon in the left hand menu as shown below.

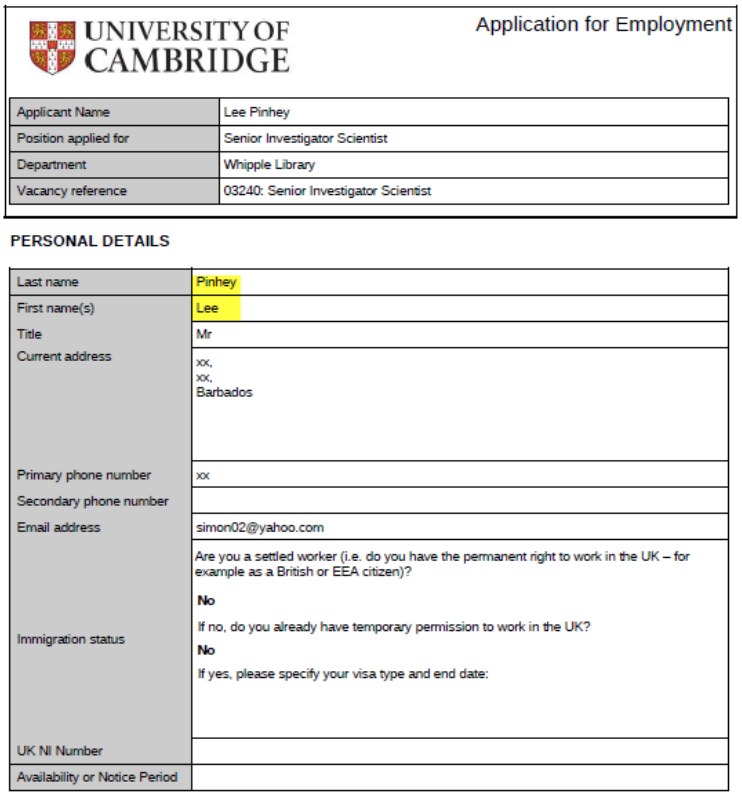


You can then see the documents in the pack listed separately by applicant.



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





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	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)? **No** If no, do you already have temporary permission to work in the UK? **No** If yes, please specify your visa type and end date:
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.

4.2.2 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.

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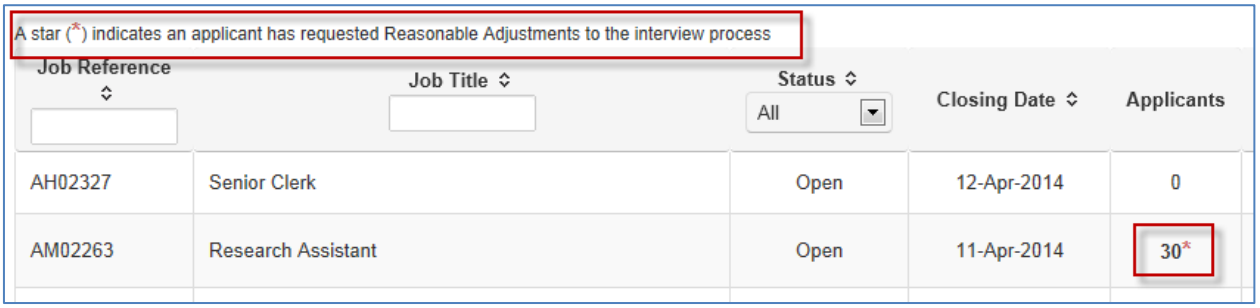
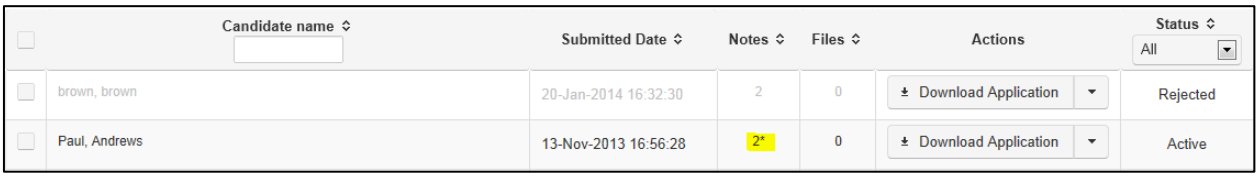
Where one or more applicants for a vacancy have requested a reasonable adjustment, this is indicated on the vacancy screen with a red asterisk (*) next to the number of applicants.



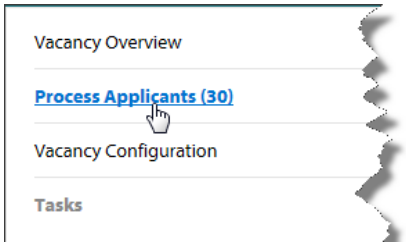
Only those with Admin access to a vacancy can view reasonable adjustment requests. Any recruiters who have only been granted Read or Write access to a vacancy are responsible for checking with a colleague with Admin access if there is anything that they need to be aware of in order to accommodate a reasonable 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.

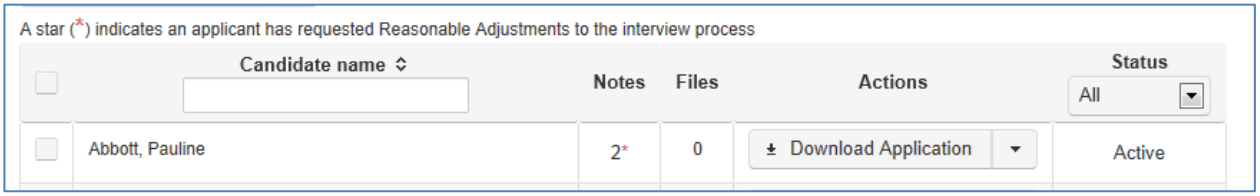


The reasonable adjustment request made can then be viewed by those with Admin access by completing the following steps:

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.



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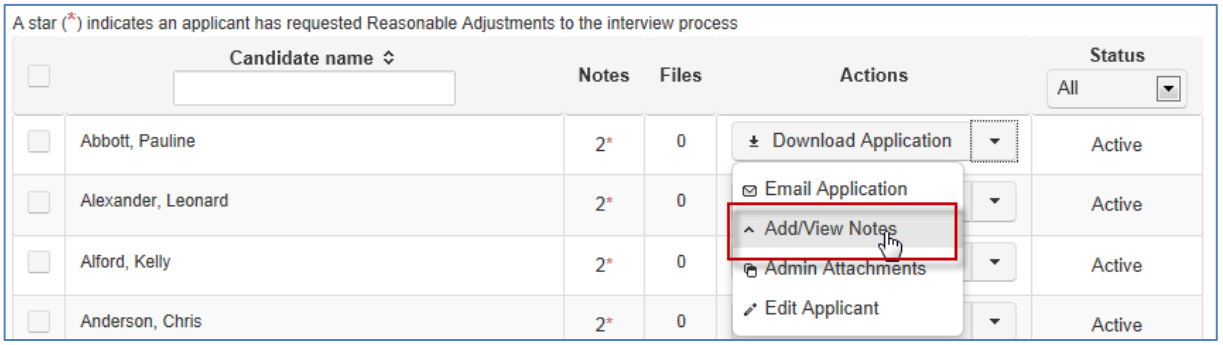
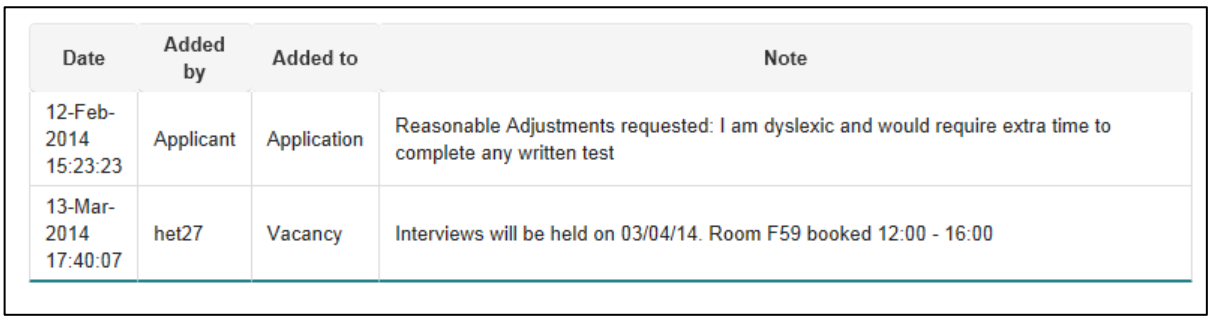
2. Click the drop down arrow to the right of **Download Application** and select the **Add/View Notes** option from the menu.



3. 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

4. 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.

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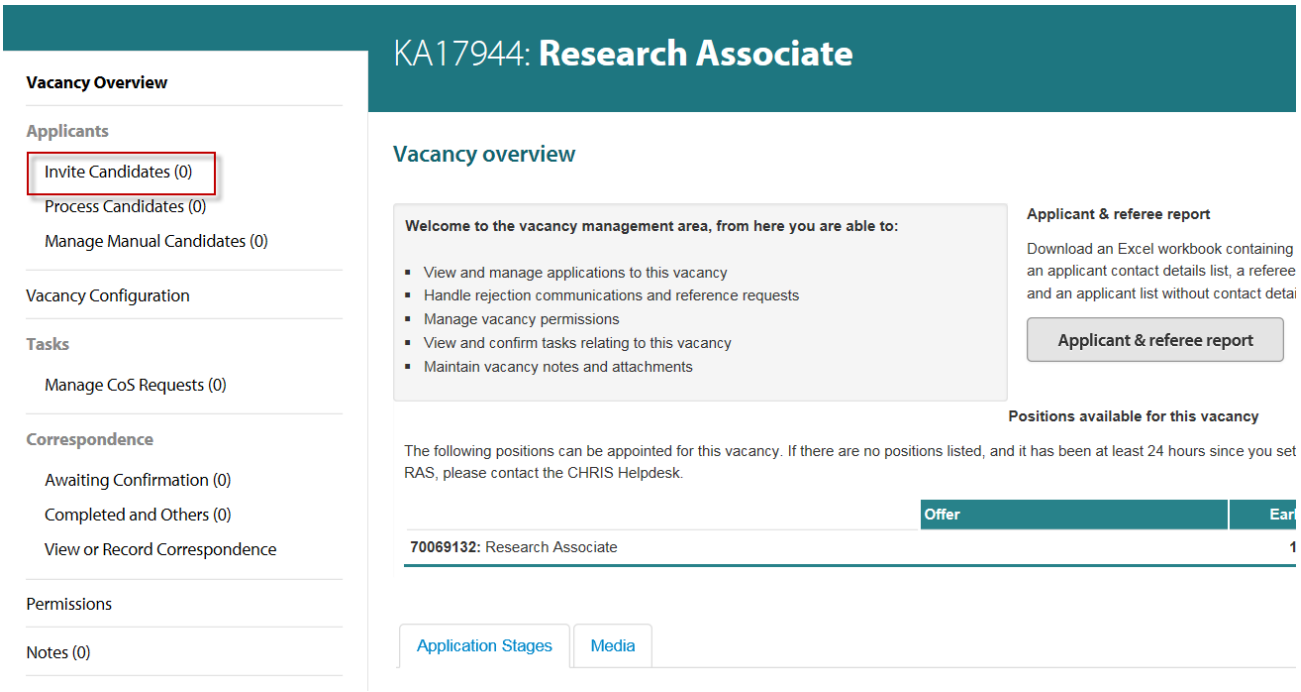
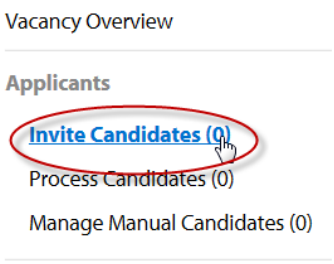
4.3 Invite Candidate: where you have not collected applications through web recruitment

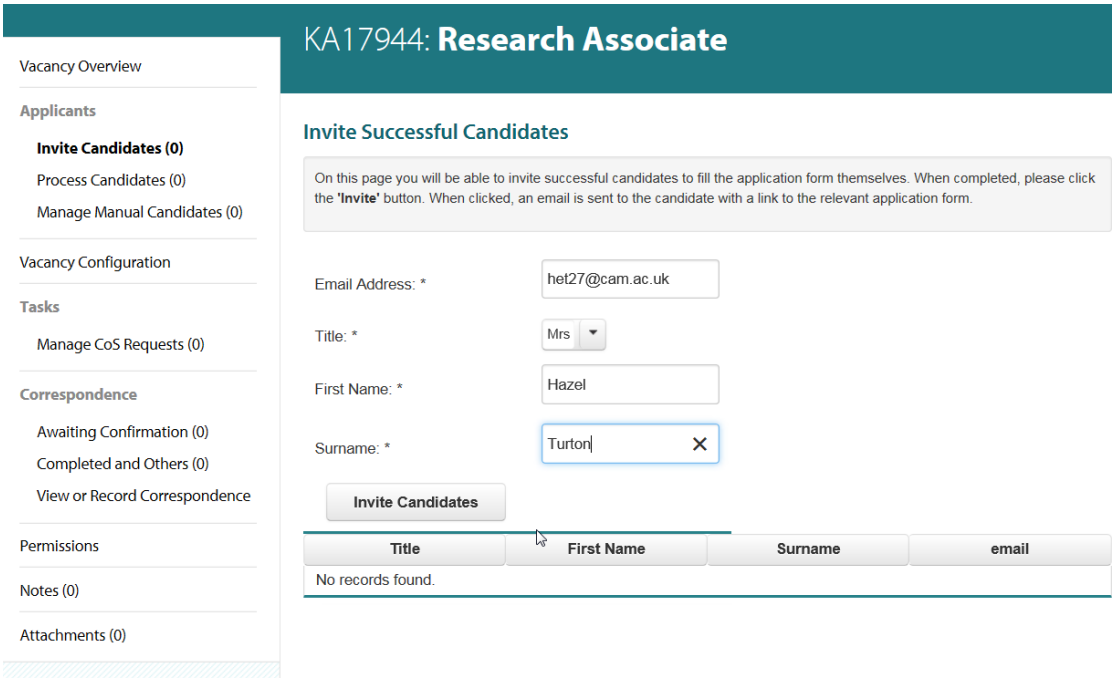
Where applicants have not applied via the Web Recruitment system e.g. research fellows named on a grant, cases where a recruitment agency has been used, the Invite Candidate option will appear under the Applicants section of the screen.



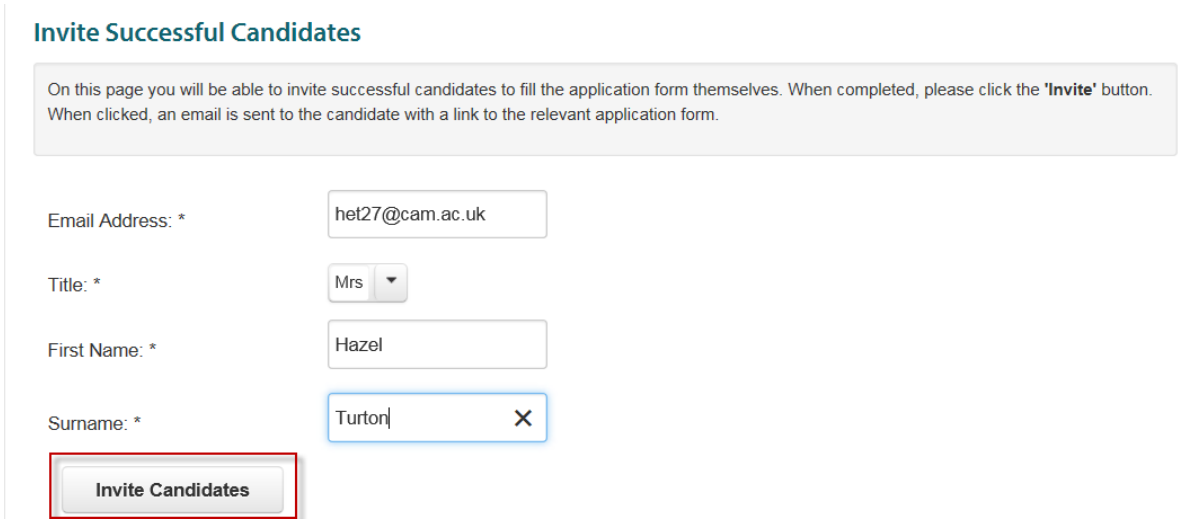
1. Select the Invite Candidates option to allow you to get the successful candidate for your vacancy to log in and provide their personal details.



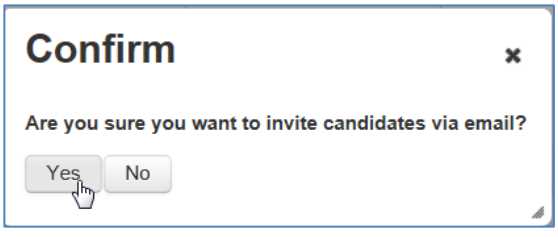
2. Enter the email address, Title, First Name and Surname of the candidate



3. Then select Invite Candidate



4. Click on Yes to confirm



5. The details of the candidate will be displayed.

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Invite Candidates

Title	First Name	Surname	email
Mrs	Hazel	Turton	het27@cam.ac.uk

6. The candidate will receive the following email

Mon 25/02/2019 17:24

do_not_reply@admin.cam.ac.uk

The University of Cambridge: please provide some information

To Hazel Turton

Dear Hazel Turton,

This email was sent automatically by the University of Cambridge's Web Recruitment System.

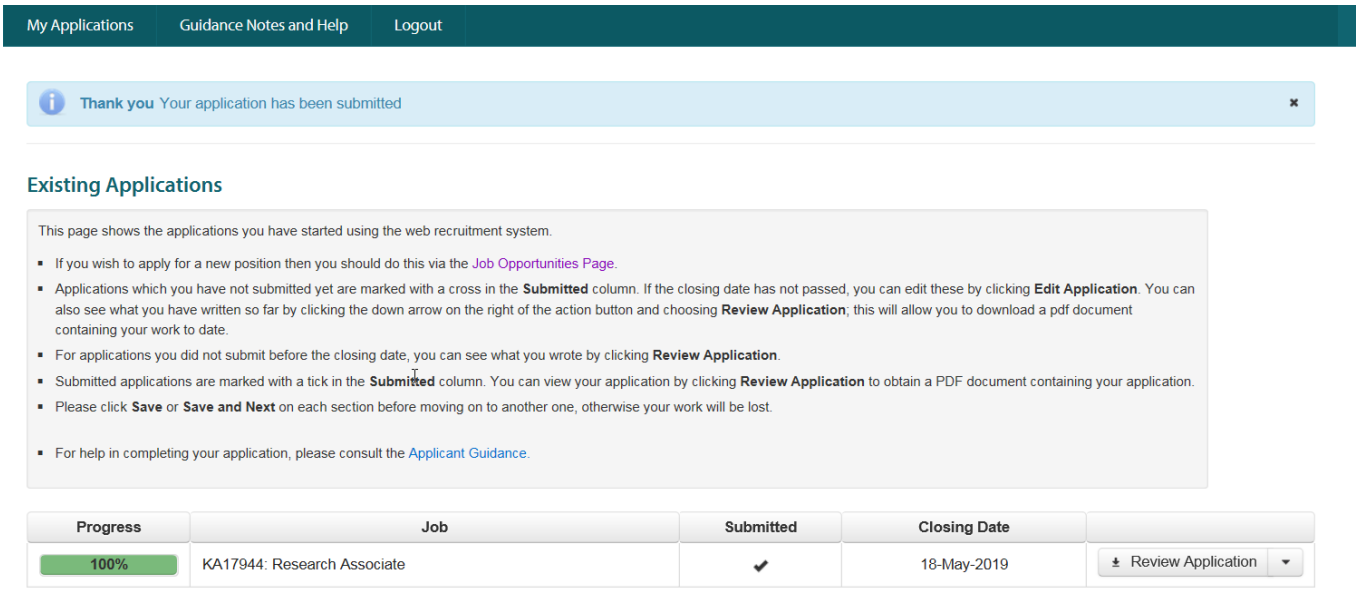
Please can you provide your personal details via our Web Recruitment System for the role of Research Associate, to enable us to progress your appointment.

If you are already registered (for example, if you have applied for a job with the University before), please click the link below to login and fill in the application form
https://staging.hrsystems.admin.cam.ac.uk/recruit-ui/apply/KA17944

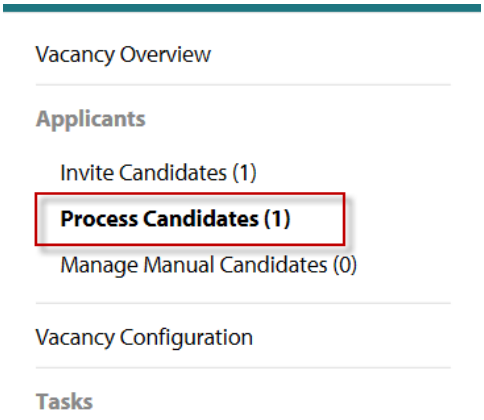
If you haven't registered, please click the link below
https://staging.hrsystems.admin.cam.ac.uk/recruit-ui/pages/auth/register.xhtml?vacancyRef=KA17944

Please note that guidance on completing our application forms is available from the following link:
http://www.jobs.cam.ac.uk/applying/applicant-guidance-web-recruitment.pdf

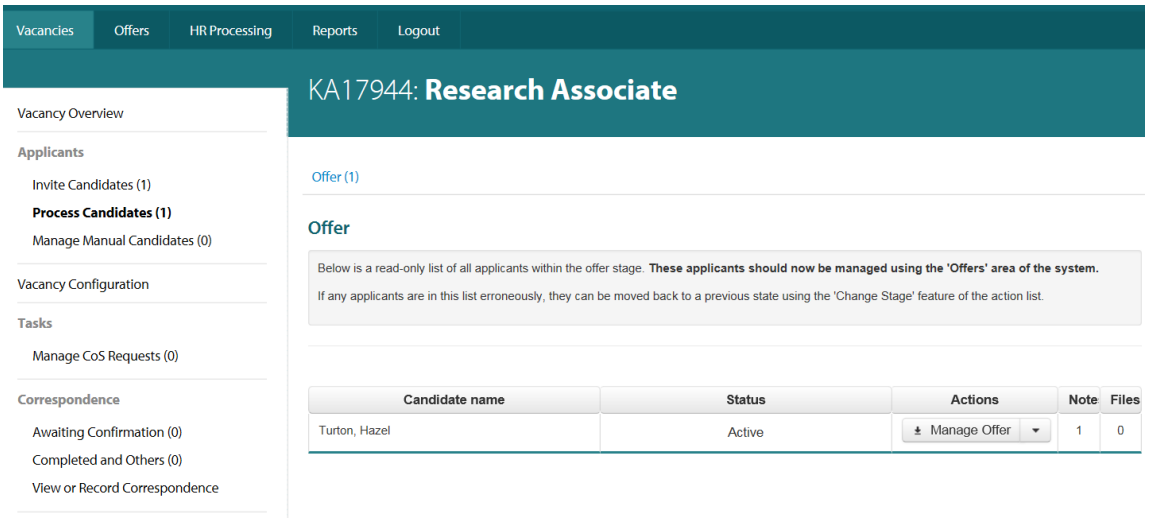
If you were not aware of this vacancy please email us at
Technical.RecruitmentSupport@admin.cam.ac.uk.



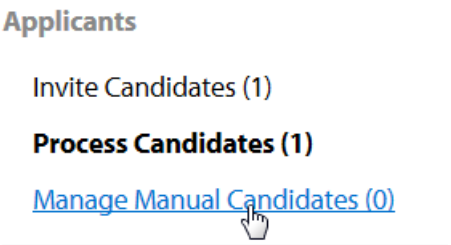
7. Once the candidate has submitted their application it will appear in Web Recruitment under Process Candidates at the “Offer” stage. An email will be sent to all users with ‘Admin’ permission on the vacancy, so it is not necessary to keep checking.



8. You will be able to then process the Offer for the candidate.



If you don't want to invite your candidate to log in and provide their own details then you can create their record manually. To do this select the Manage Manual Candidates option



This works just the same as the Manage Manual Applicants as detailed below.

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4.4 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, or they have missed the deadline for applications but you still wish to accept their application).

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. Electronic copies of the CHRIS/5 and CHRIS/6 forms are available on the HR web pages at http://www.hr.admin.cam.ac.uk/forms

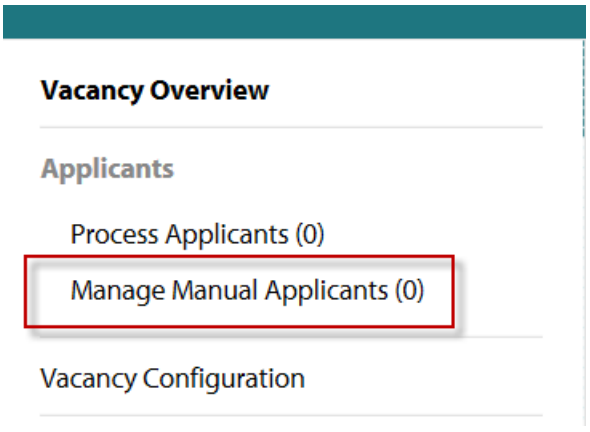
Information on providing application forms in alternative formats is found at http://www.hr.admin.cam.ac.uk/recruitment/step-2-recruitment-planning/determine-application-process/alternative-formats

Please note: once a non-online (manual) application has been submitted to you, details about the applicant must be entered onto the Web Recruitment System from part 3 of the form so that we have equal opportunities and HESA information. This part of the form must be detached when the application form is uploaded. This ensures that:

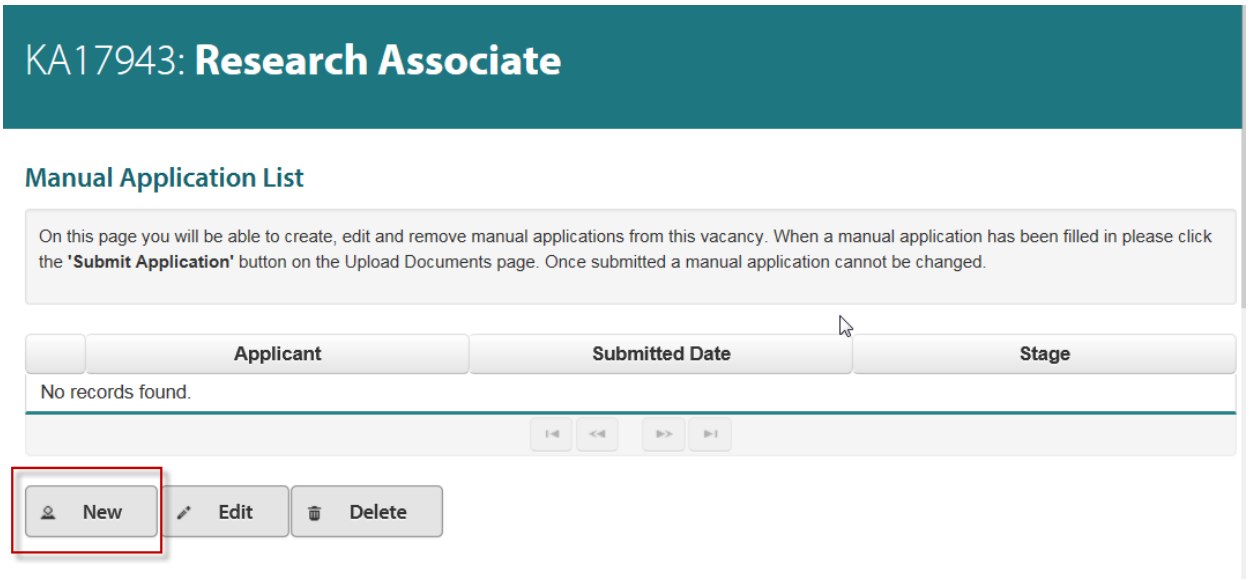
- There is a full audit trail for your selection process stored in one place;
- You will be able to use the offer process and make an Appointment Request for the applicant (if he/she is successful) in Web Recruitment;
- The New Appointment Team will be able to transfer the applicant's details into CHRIS;
- 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:

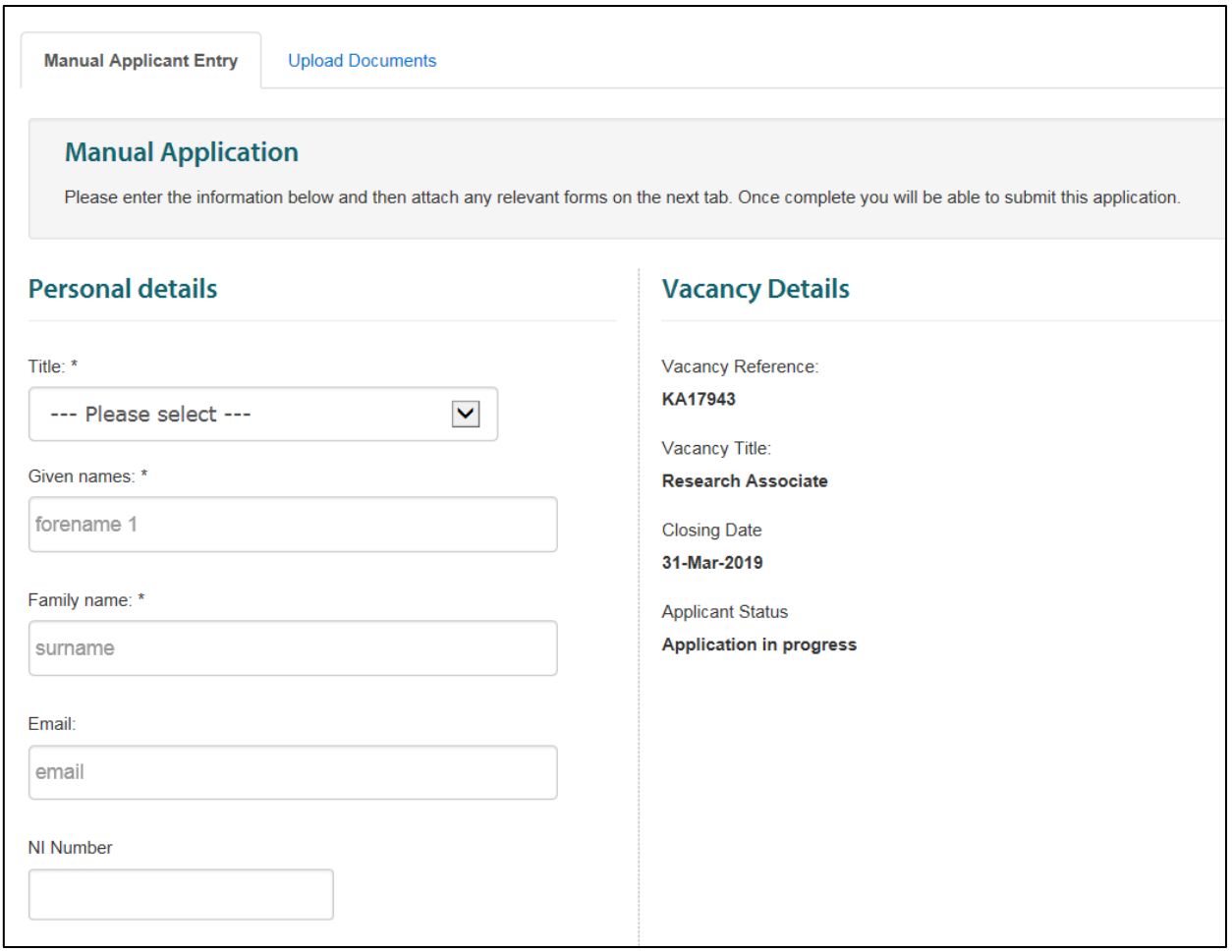
1 Select the vacancy to which you would like to add an applicant and then click on **Manage Manual Applicants** option:

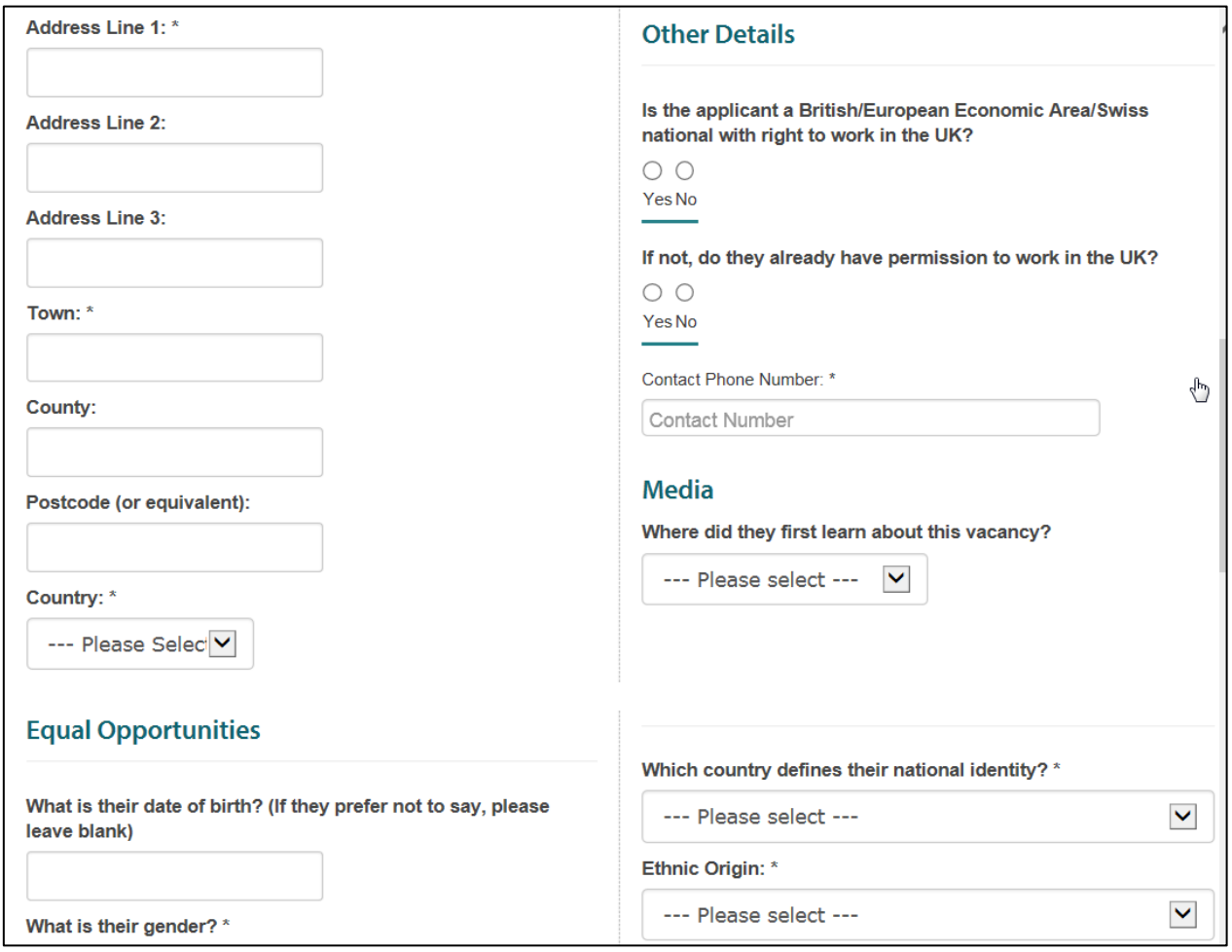


The following screen will be displayed:



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





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

3. Enter the 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.

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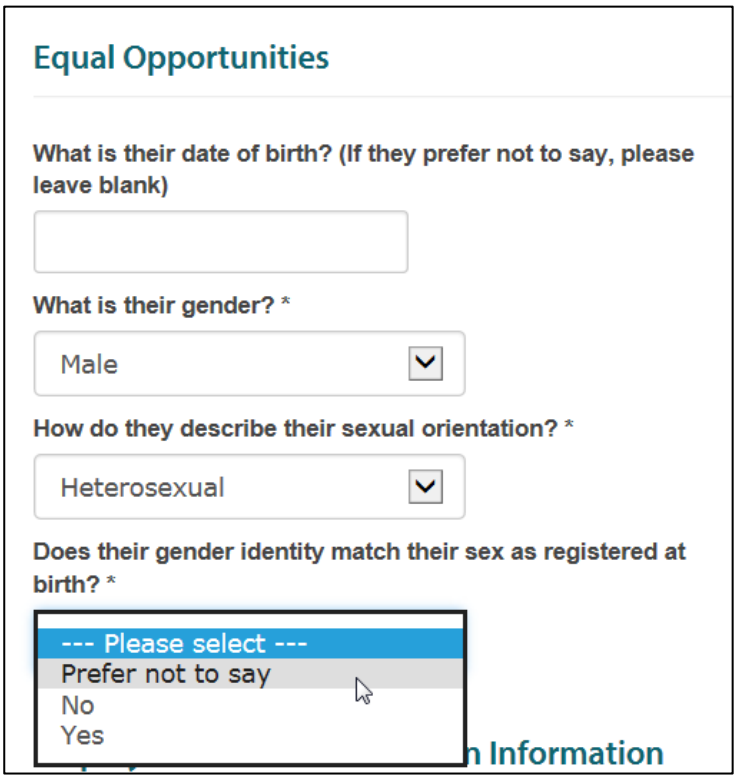
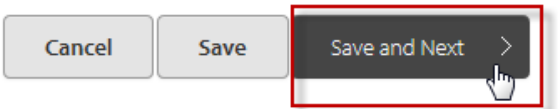


5 Click on the **Save** button if you would like to save your work and go on to add an attachment, or return to complete the applicant's details at a later time.

6 To upload attachments for an applicant, click on the **Save and Next** button.



7 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.

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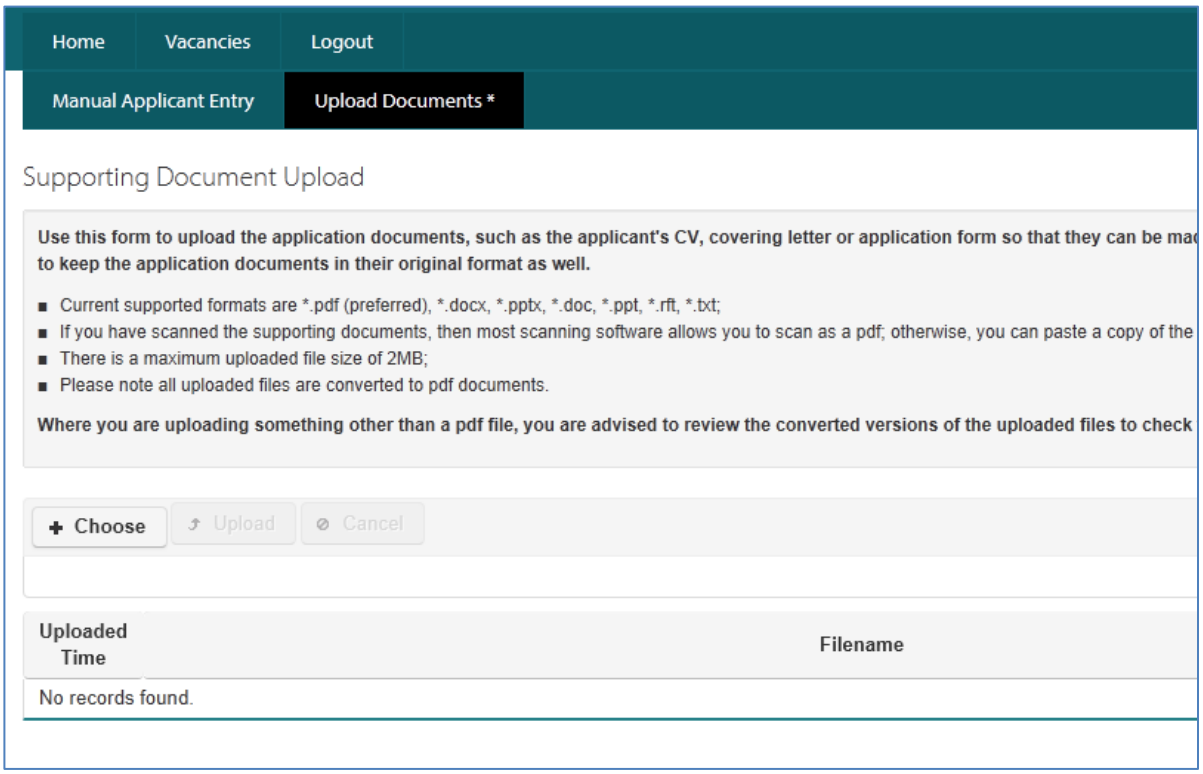

You can upload documents in any of the following file formats:

- 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.

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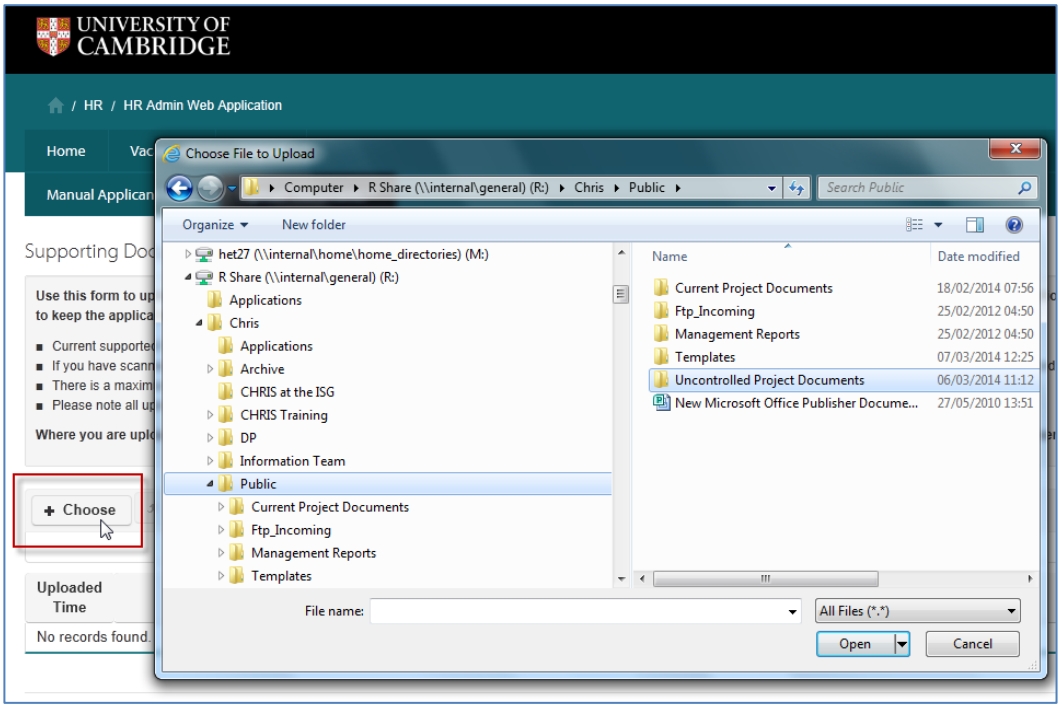
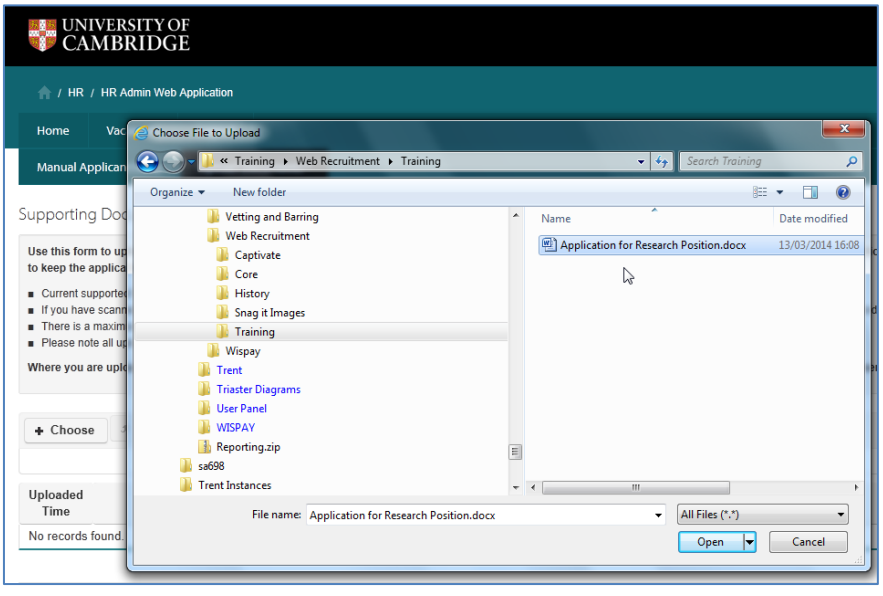
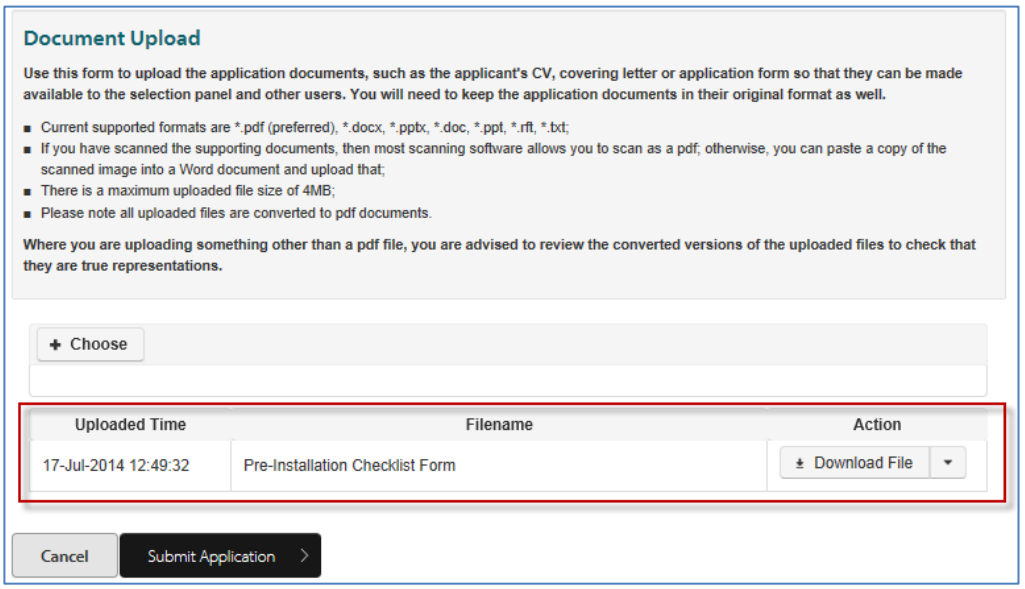
10 To upload a document, click on the **Choose** button.



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.

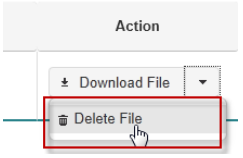


From here you can see the time and file name of your upload, and you can also download a copy of the document or delete the file.

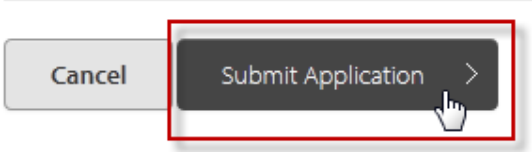
To view the uploaded document, click on the **Download File** button in the **Action** field.

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.

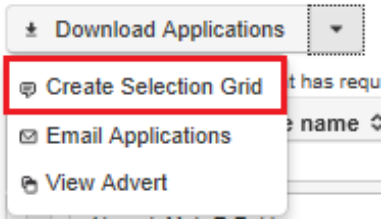


The applicant should now appear under received applications when the **Process applicants** menu item is selected in the vacancy. The application will initially be given a status of **Received**.

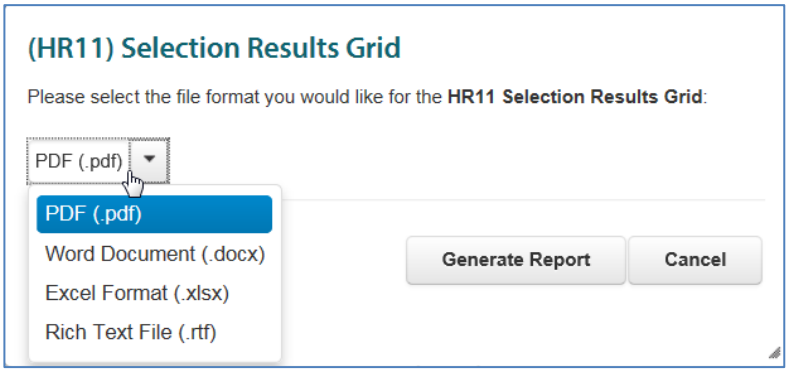
4.5 Creating a selection grid

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. Once the selectors have completed the grid this can be uploaded as an attachment.

UNIVERSITY OF CAMBRIDGE

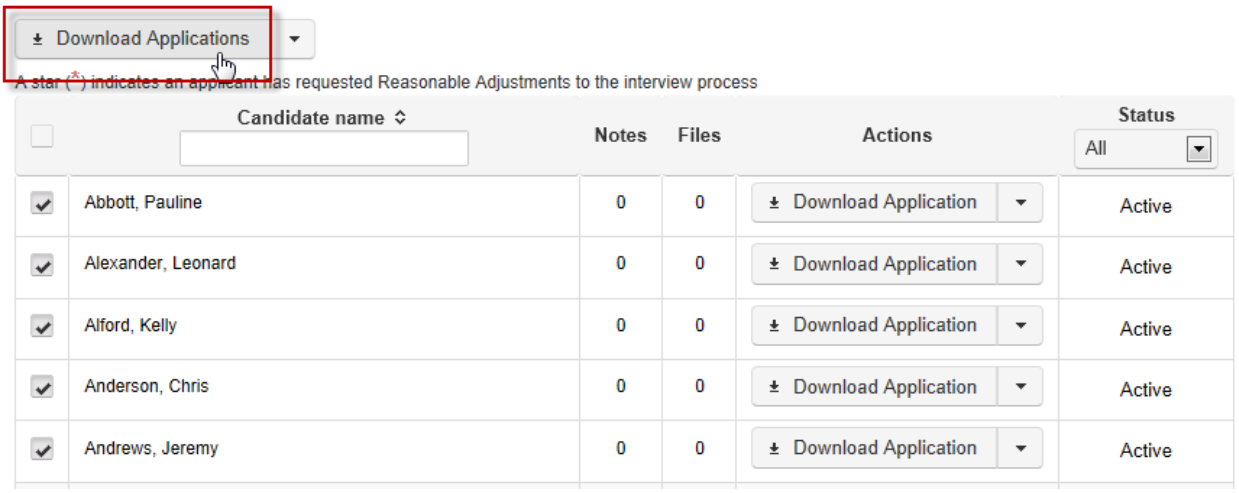
Selection Results Grid

Vacancy Title	Language Teaching Officer	**Vacancy Reference Number**	04286
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													

4.6 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.

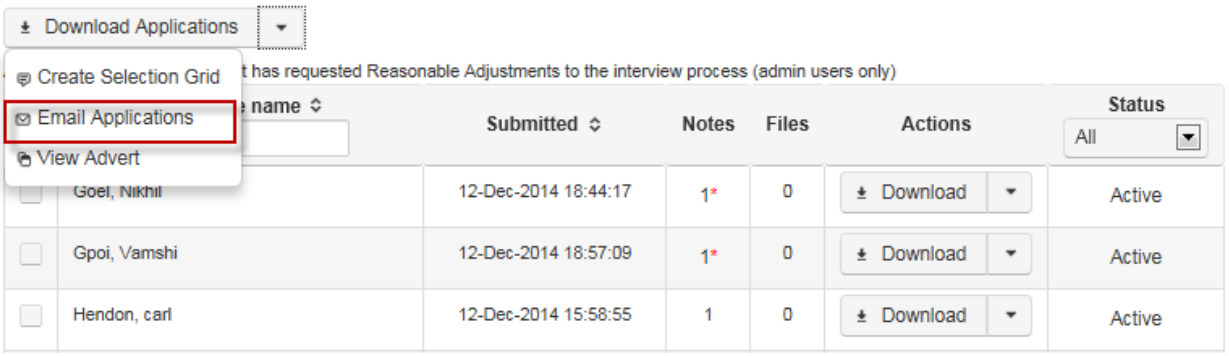


Your browser will then prompt you to save or open the pack.

Select **Open** or **Save** as required. The system will automatically add 'This page is intentionally left blank' where the number of pages is odd.

4.7 Emailing an applicant pack

Click on the **Email Applications** option at the top of the applicant list.



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

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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.

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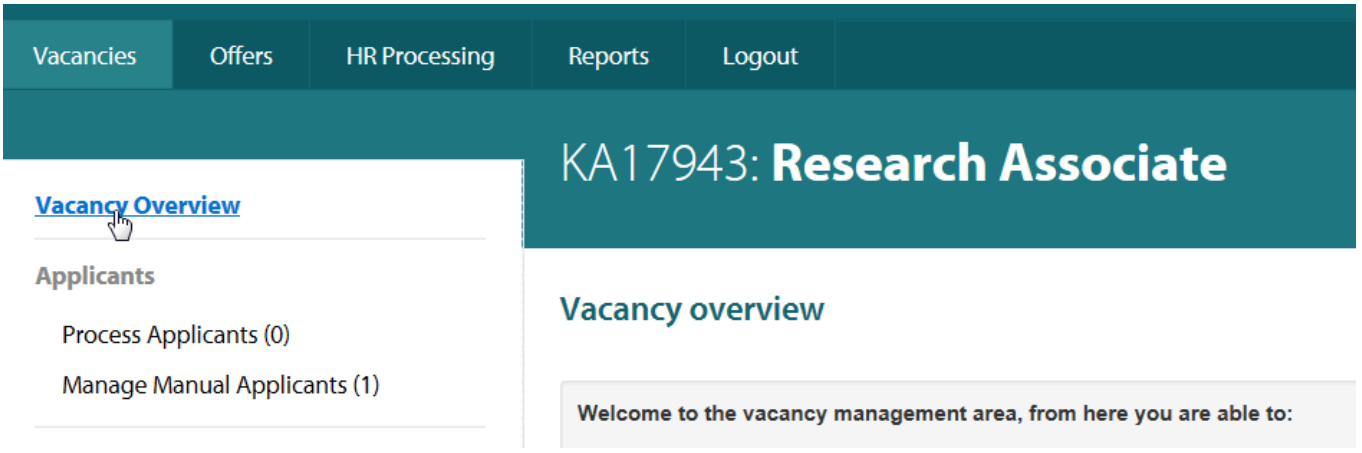
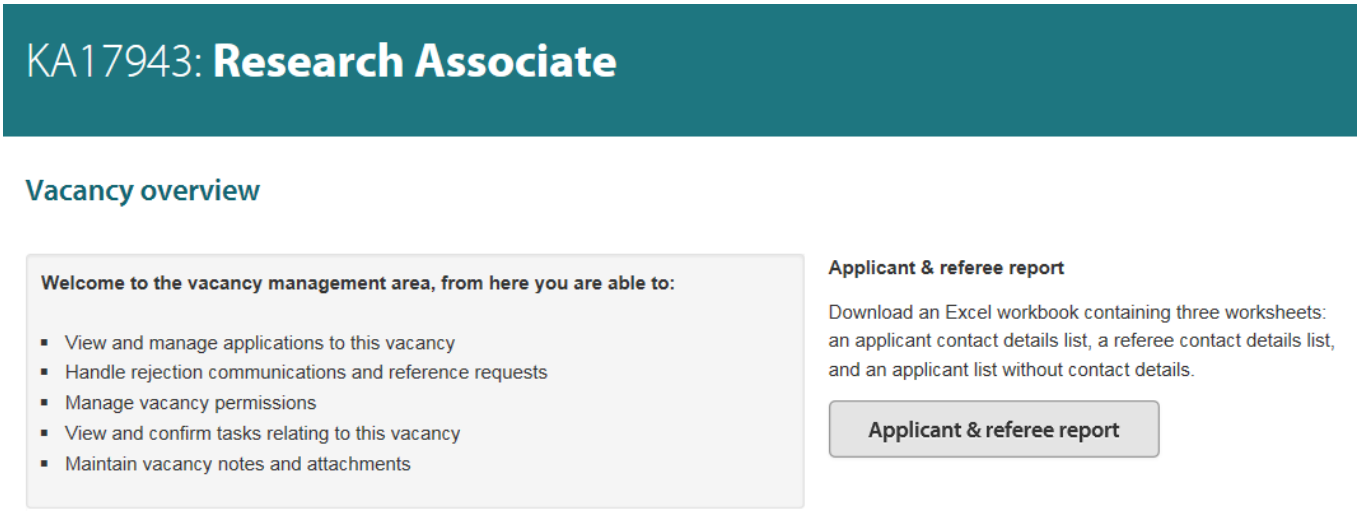
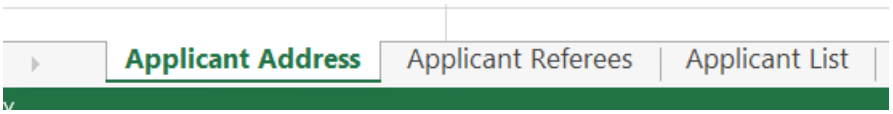
4.8 Generating applicant and referee reports

The Vacancy Overview screen provides the option to produce and Applicant and referee report.





Select the option Applicant and referee report. The report will open an Excel workbook with 3 separate sheets



Use the Filter option in Excel to view applicants at different stages of the application process.

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5. Updating applicant records and their progress (where you have collected applications using web recruitment)

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.

5.1 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.

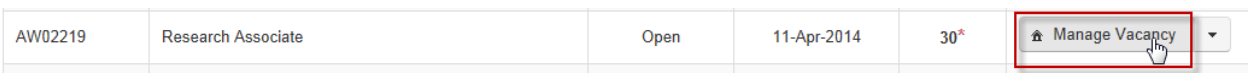
A number of stages have been defined and these are:

- 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).

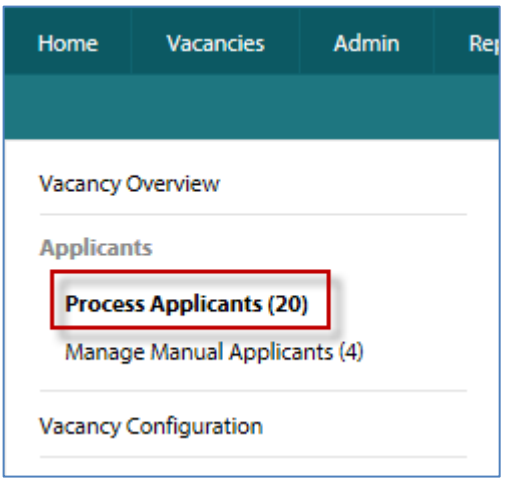
The brackets in the list above indicate the abbreviated name of each stage as it shows on the tabs across the top of the screen. For clarity, a full version of each stage name is used in the drop-down list where you change the status/stages of applicants.

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).

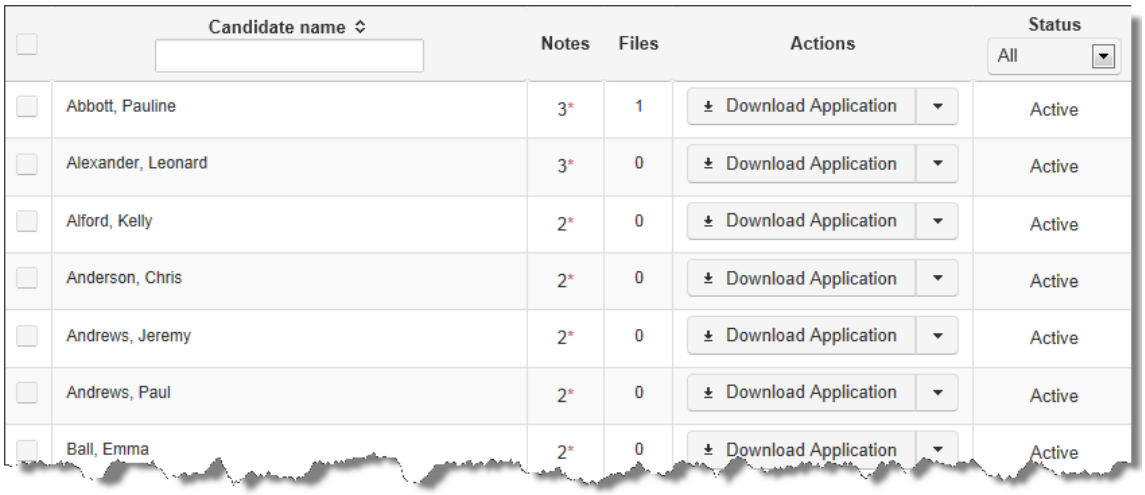
1. From the main vacancy screen, click on the **Manage Vacancy** button next to the vacancy you wish to manage.



2. Select **Process Applicants**.

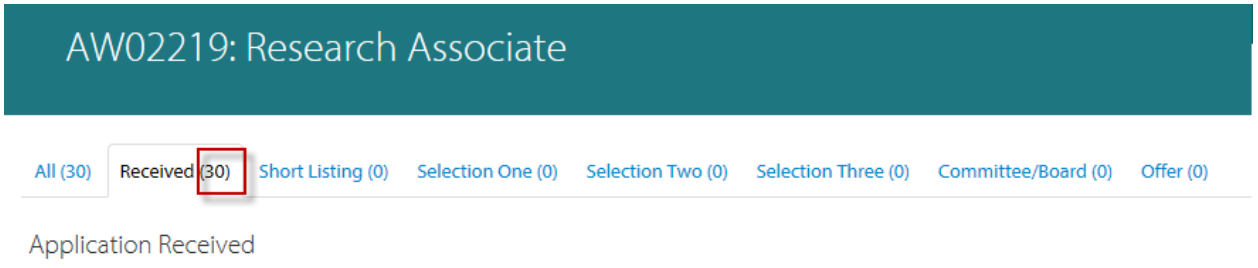


A list of applicants will be displayed.



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.

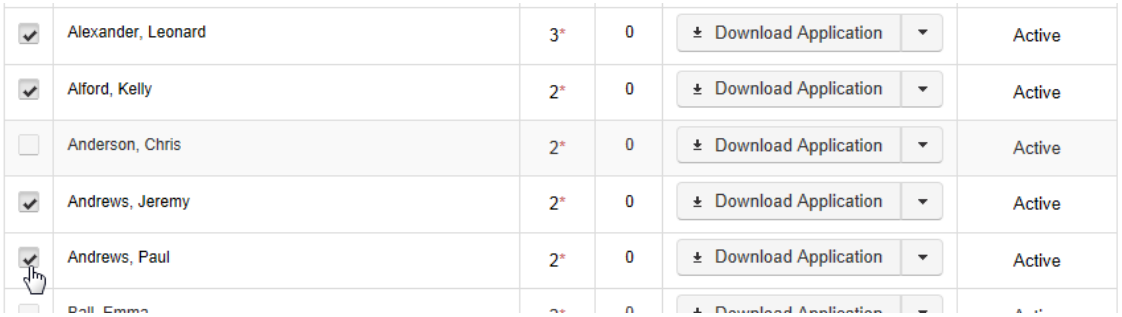
The number of applicants at a given stage is shown next to the stage name.



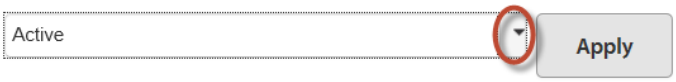
3. Click on the tab that reflects the selection stage you wish to view or process. This will display the current applicants at that stage of the process.

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

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

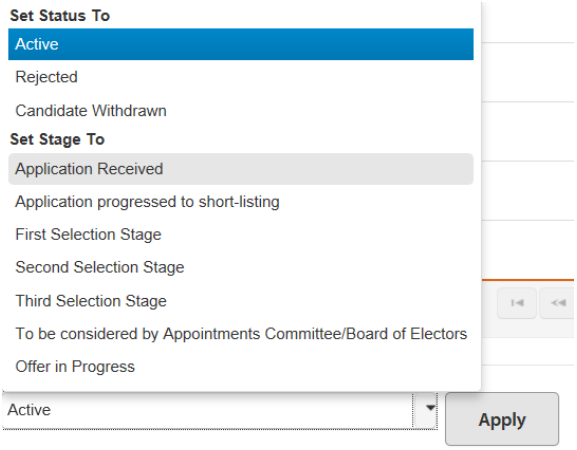


5. At the bottom of your list of applicants, there is a drop-down menu with an **Apply** button next to it. Click on the drop-down menu arrow to open up the options.



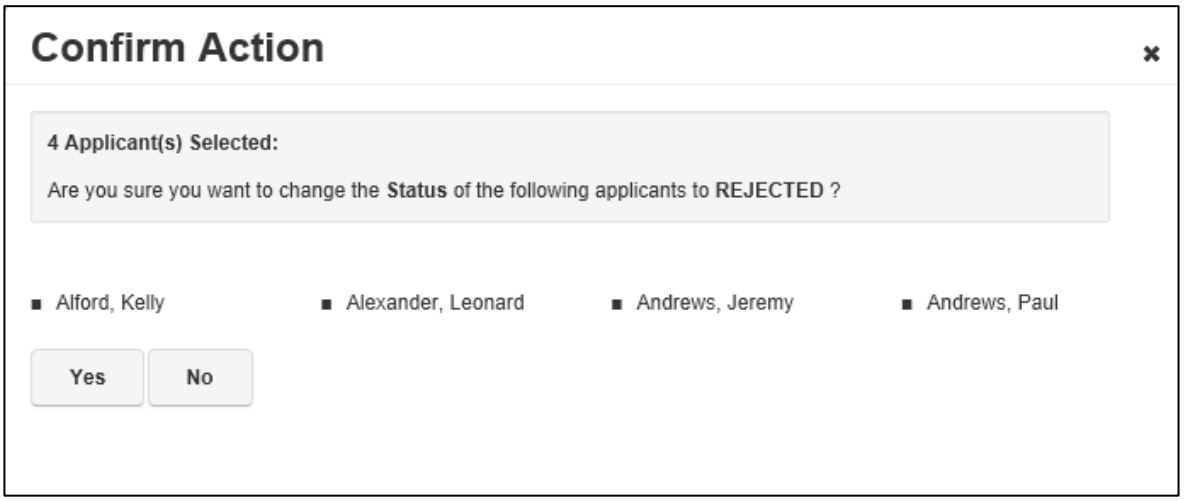
   You will see in the list that you can either:

   - 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).

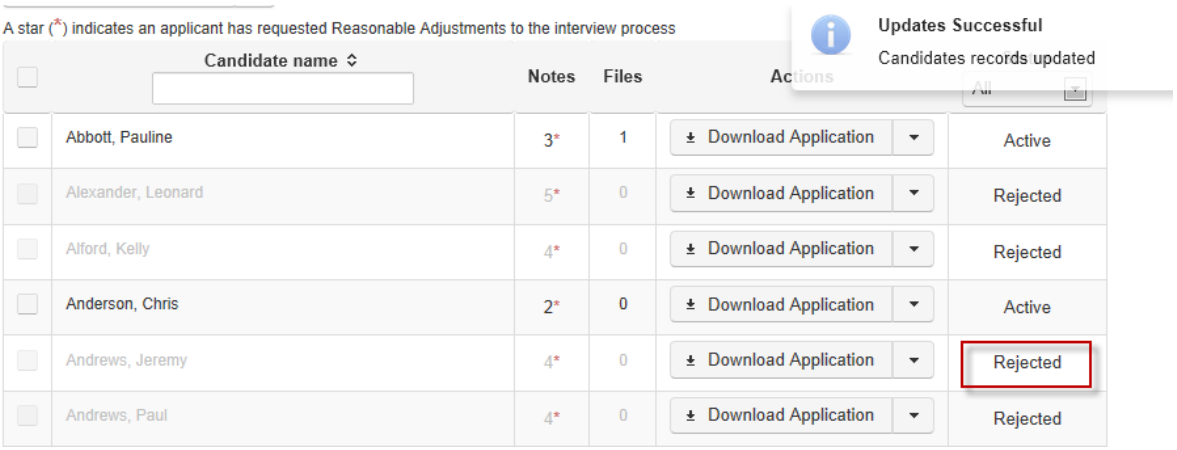


6. Choose the status or stage you wish to allocate to your selected applicants from the drop-down list and then click on **Apply**.

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



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).



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.

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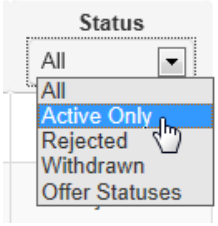

Applicants can be processed through all stages relevant to the vacancy's selection process.

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).

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- 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.

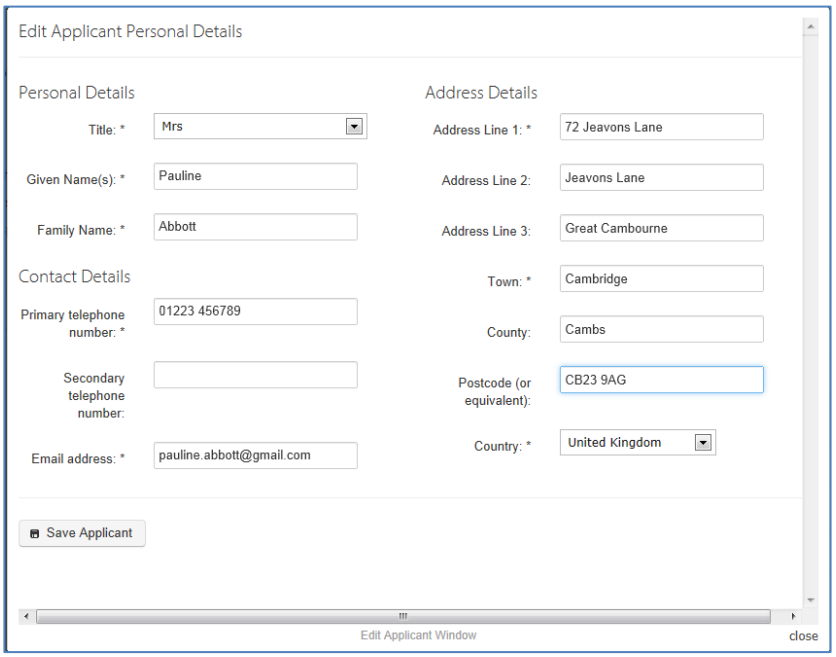
- It is not possible to mark a vacancy as 'Complete' (i.e. that the selection process has ended) without recording the outcomes of the selection process (i.e. if applicants have not been rejected or made an offer). Please see section on Completing Recruitment for a Vacancy for details of why it is important to be able to complete a vacancy in the system.

5.2 Editing the details of an existing applicant

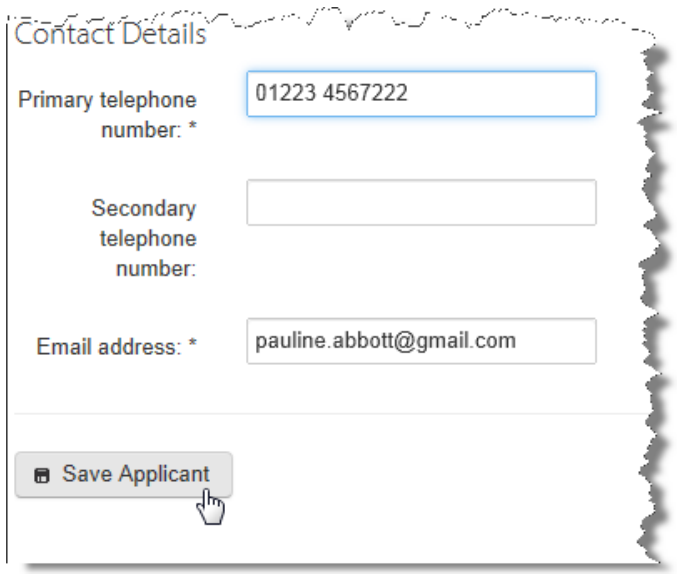
If an applicant contacts you during the recruitment process to inform you that his/her personal details have changed (e.g. name, contact details), you can edit these within the system.

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

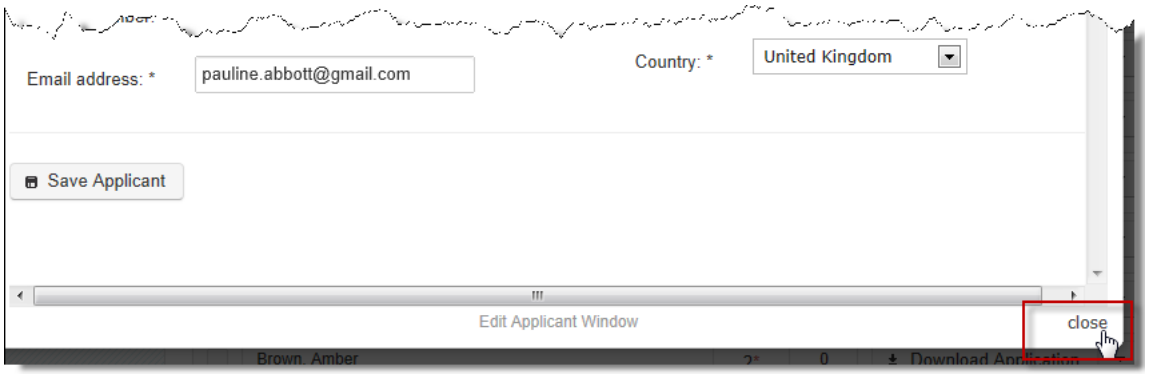
An **Edit Applicant Personal Details** pop-up window will appear, as shown below.



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



3. 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.

5.3 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.**

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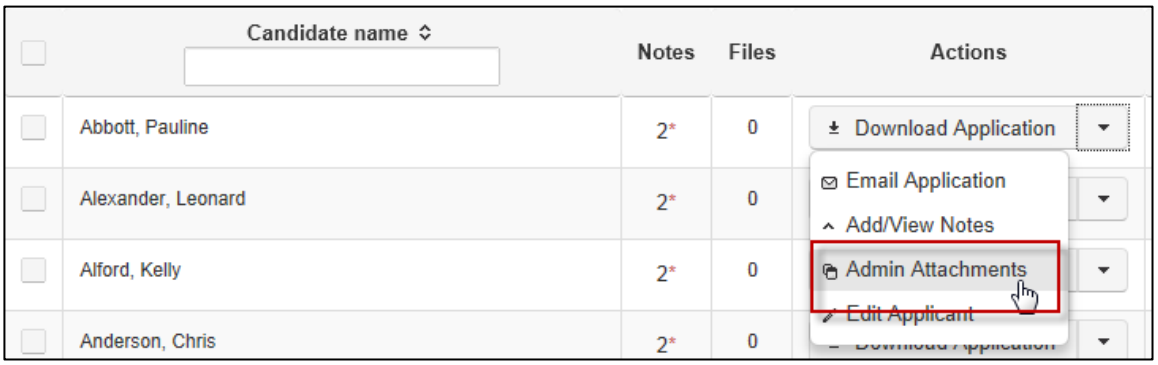
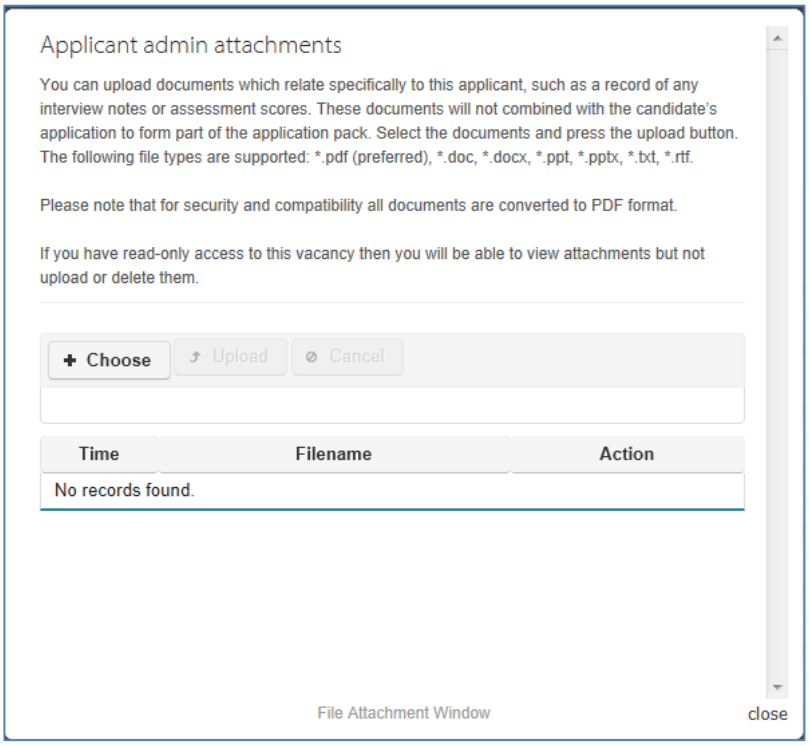
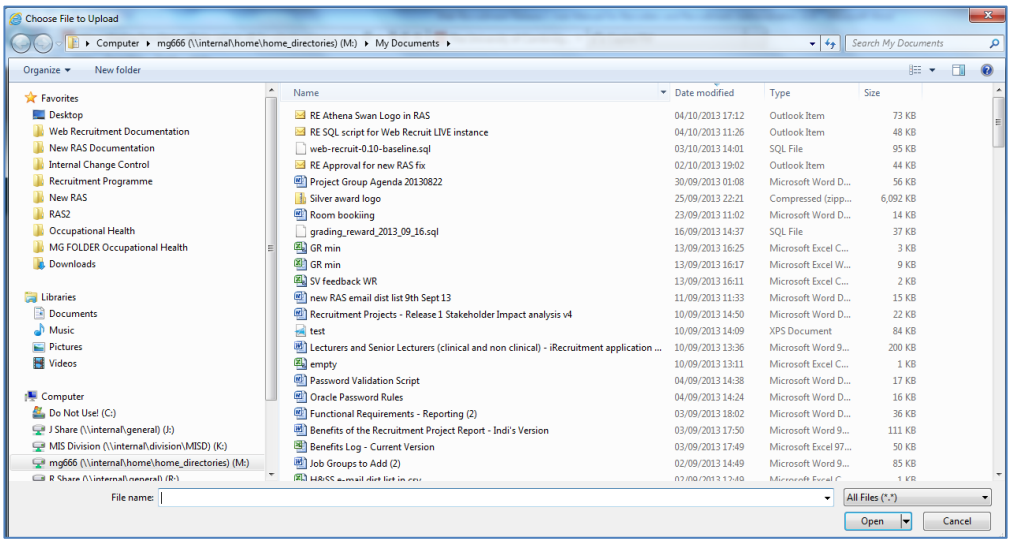


The following screen will then be displayed, including information about the types of file you can upload.

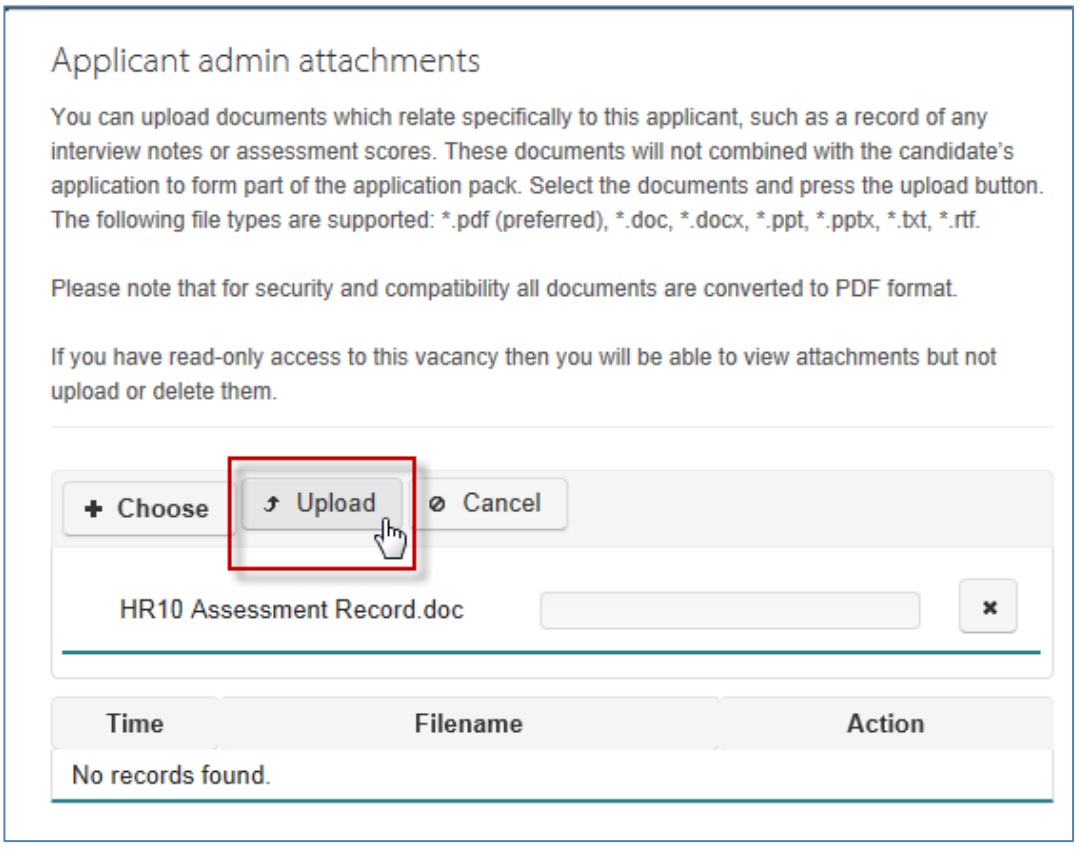


2. Click on **Choose.** Your file directory will then be displayed.

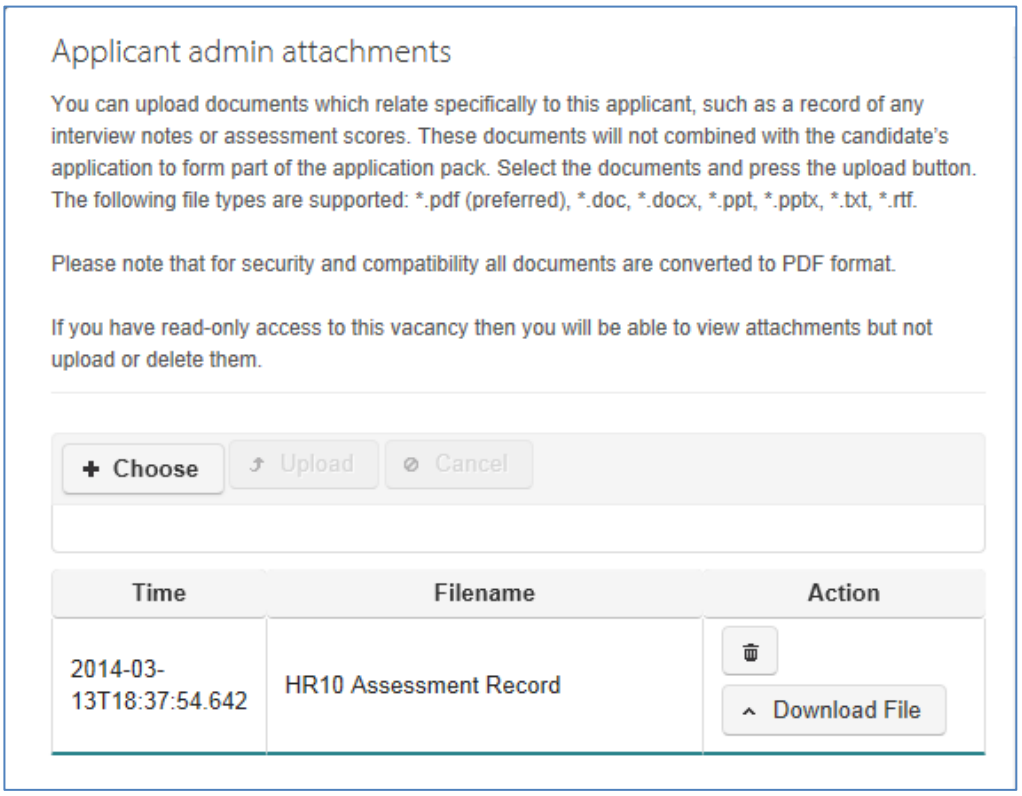


3. Select a file to be uploaded from your file directory. Double-click on it or click on **Open**.

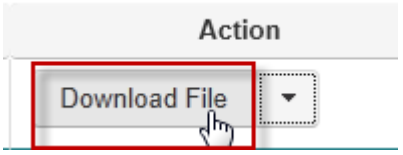
4. You will be returned to the pop-up window. You will see the name of the file you have selected. Click on the **Upload** button as shown below, to upload the file (you can click on the **Cancel** button if you have chosen the wrong file).



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



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.

5.4 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:

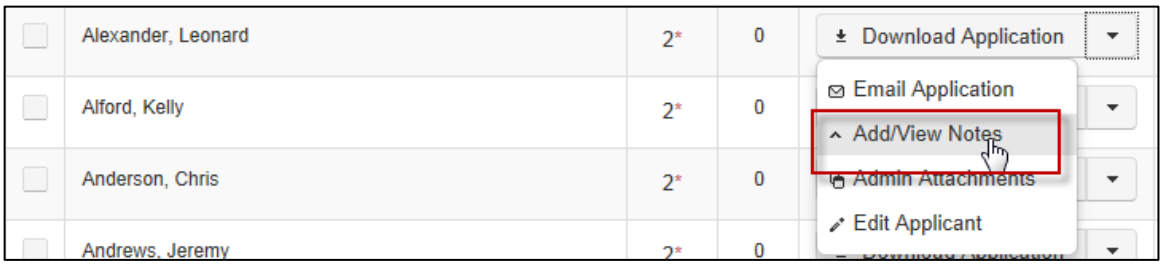
- Contact with the applicant, for example, if he/she contacts you to withdraw his/her application or to inform you that he/she cannot make the interview date/time offered.
- That a manual application you have added was screened and put forward by an agency that has been helping you to source candidates.
- 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).

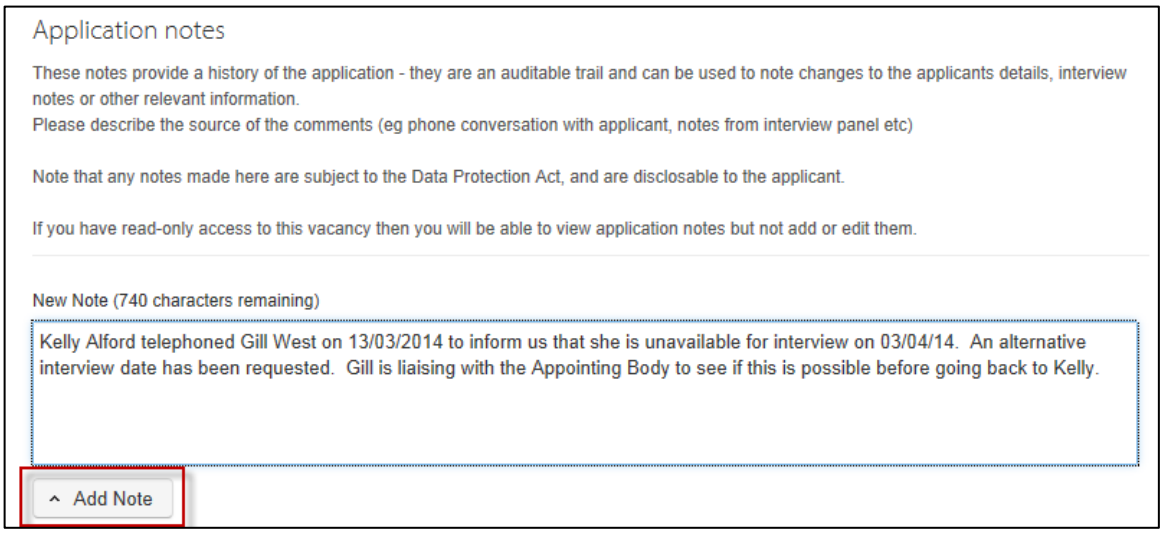
Please note: under Data Protection Legislation, all applicants are entitled to make a subject access request to see all personal data held on them, including documentation from the recruitment process. Therefore, it is vital that any recruitment documentation stored within the system or elsewhere) contains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



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**.



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.

5. 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.

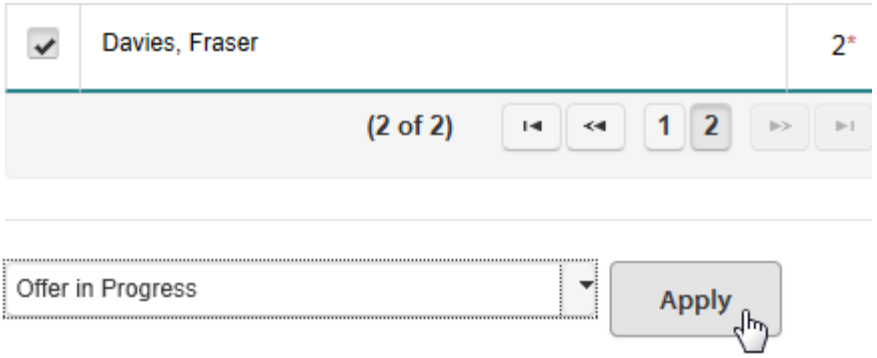
5.5 Sending rejection correspondence and reference requests

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.

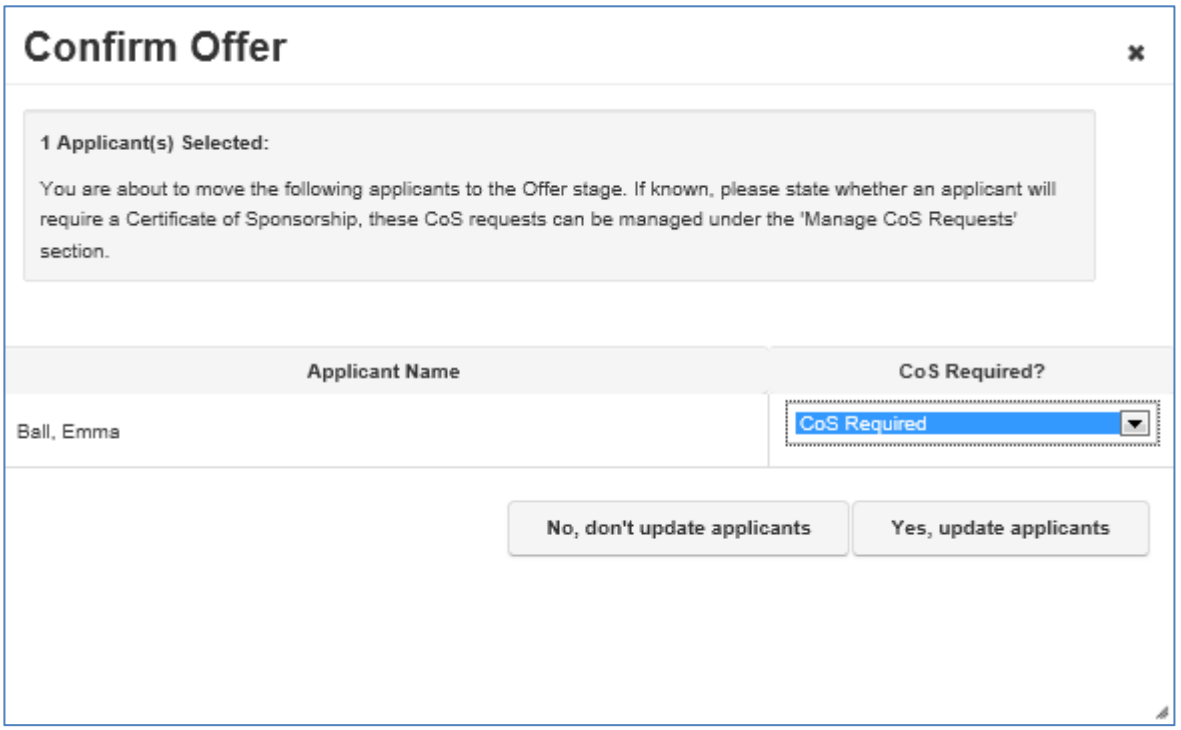
Please see the Web Recruitment user guide on Generating Correspondence on the HR Systems web pages for details of how to generate and send reference requests using the system.

5.6 The Offer Stage

1. 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.



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



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.

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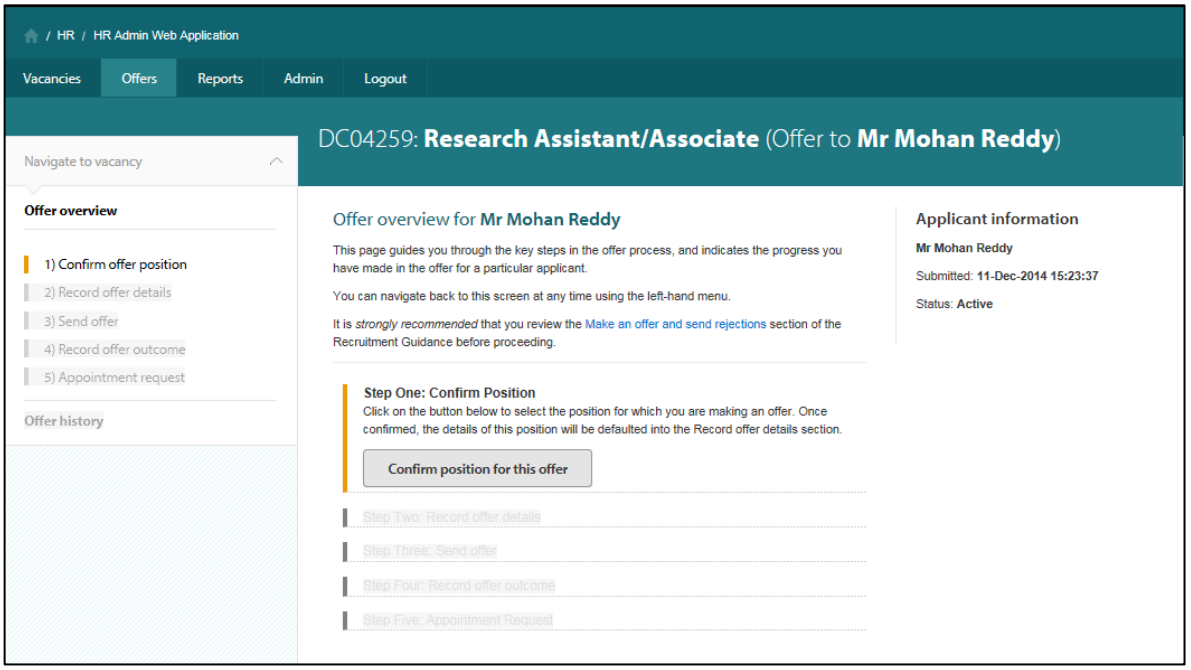
Please ensure that you record the requirement for a CoS (or not) accurately for each of your vacancies in Web Recruitment

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.

2. 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.

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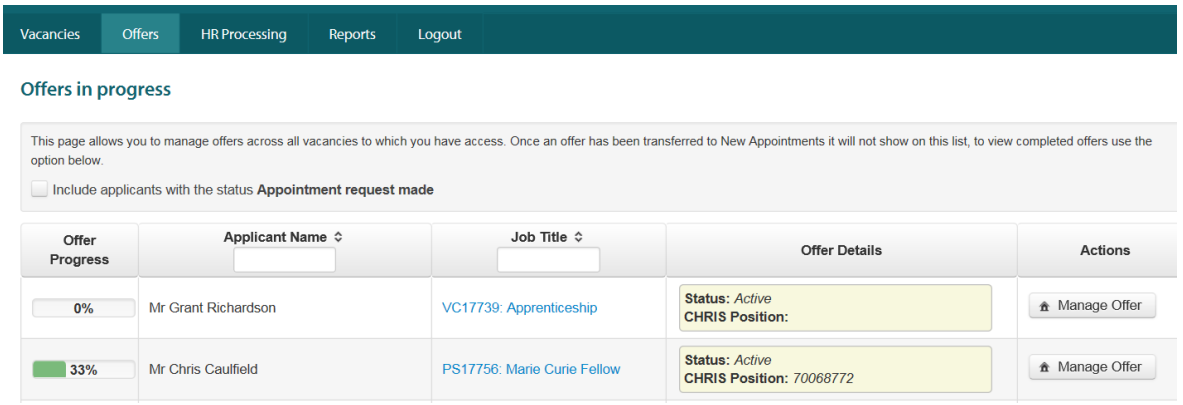
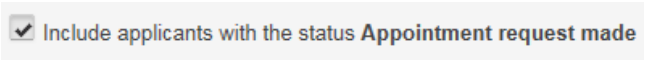


The screen shows offers where the six step process has not been finished (i.e. an Appointment Request has not yet been made) by default.

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 moved 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.

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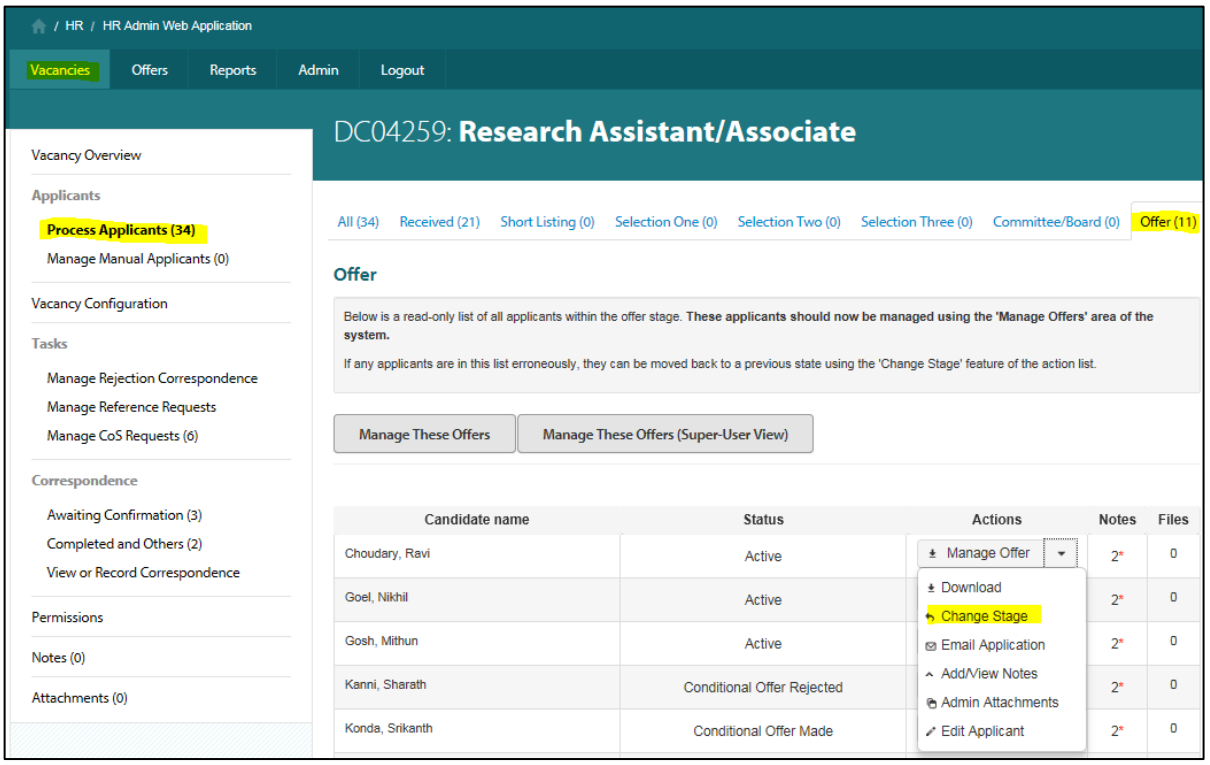
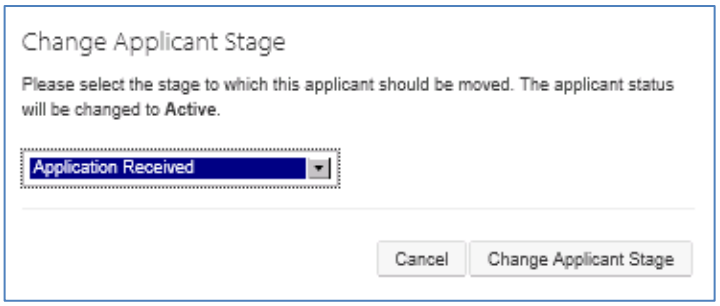
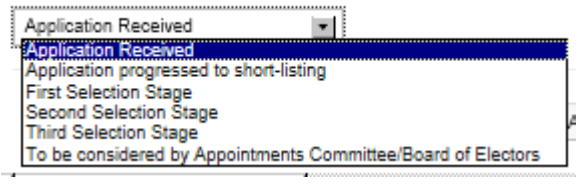


You will then see the following pop up window:



Select the stage from the drop down list:

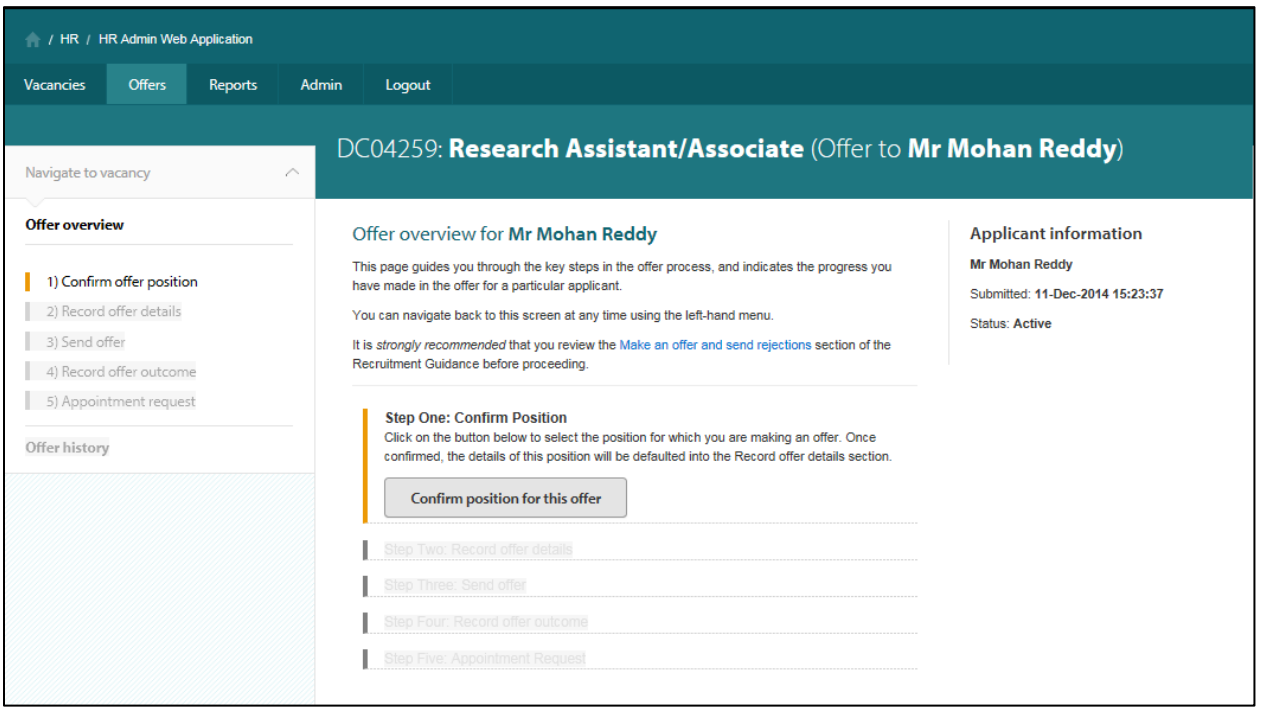


Then click on the **Change applicant stage** button.

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

6. 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.

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7. 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 the Offers process has been completed for all successful applicants.
- The recruitment process was unsuccessful and no successful candidates were taken forward to Offer from one of the selection stages.

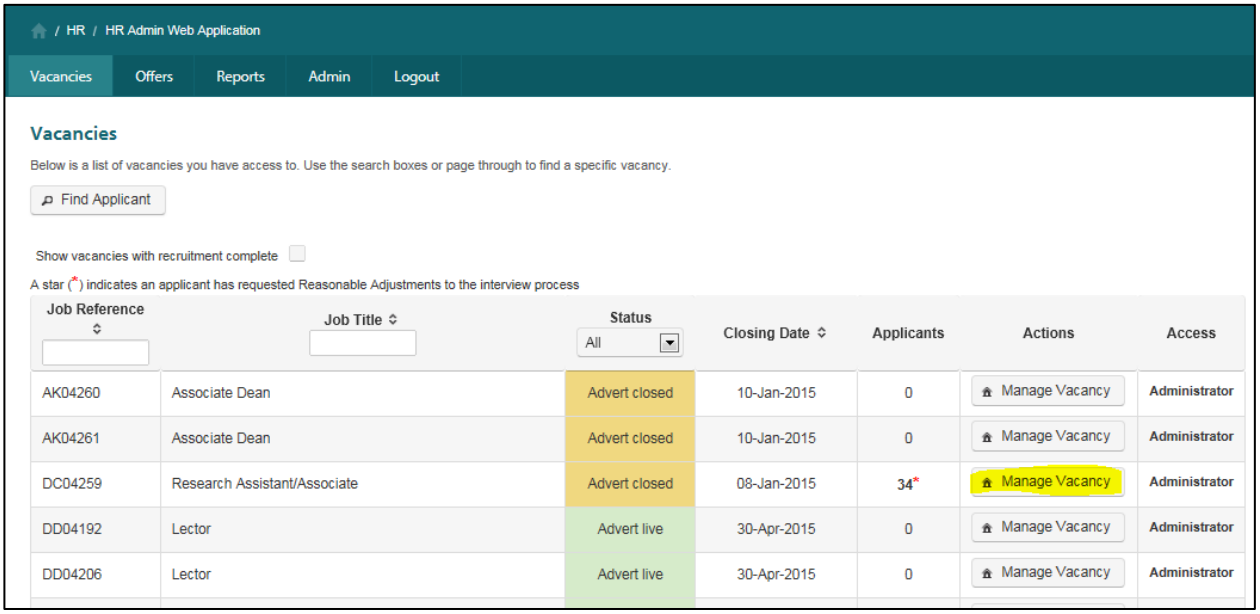
Marking a vacancy as complete will perform a number of actions within the system to benefit departments/institutions. A vacancy marked as complete will:

- 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.

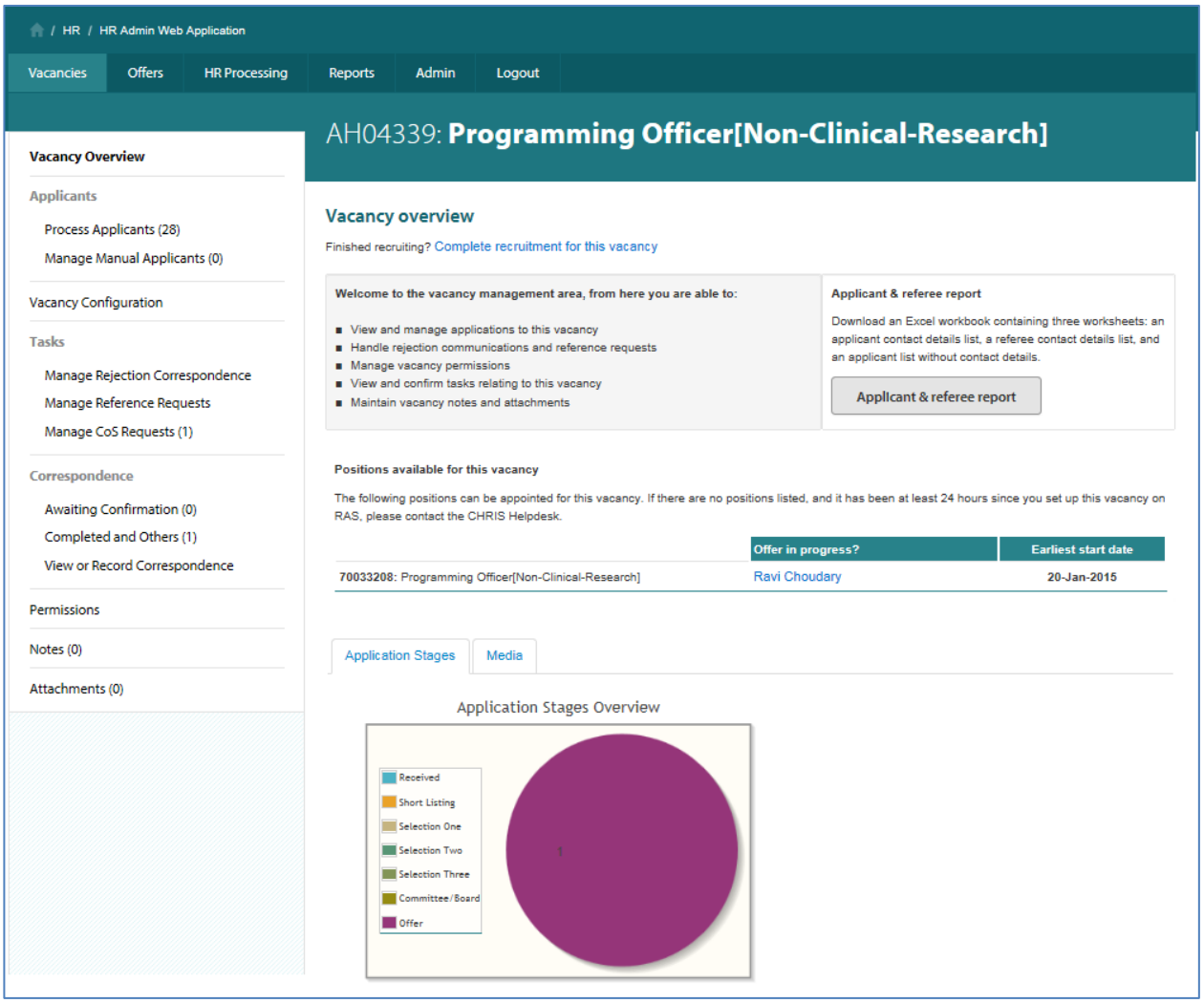
7.1 Completing Recruitment for a Vacancy

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



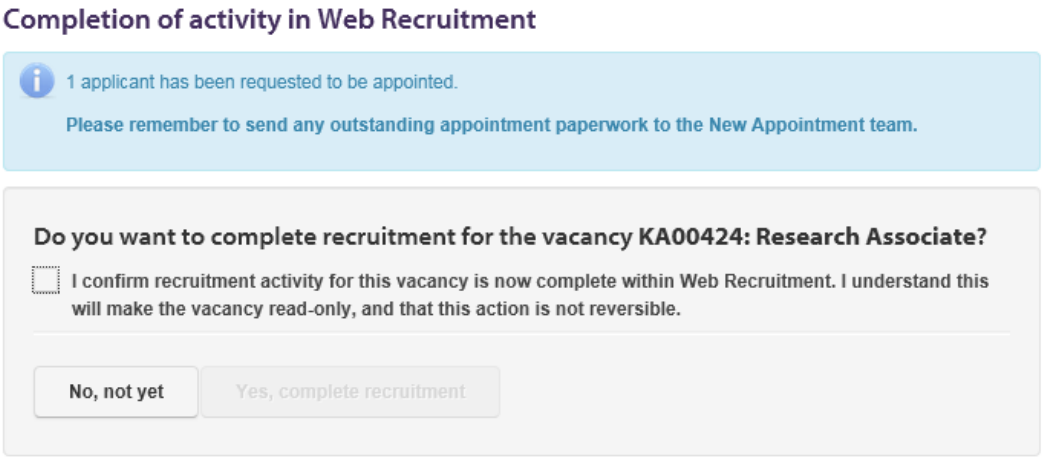
Note: Recruitment can only be completed for a vacancy when the vacancy closing date has passed (i.e. the Job Opportunities advert has closed).

2) The vacancy overview screen will be displayed:



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:



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

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.

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8. 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.

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9. Exceptions to the 'Standard' Process

Studentships

Please note that studentships are not able to receive applications using the Web Recruitment System. Studentships are not employment contracts. Please use a CHRIS/30.

Other roles

Please note that the following positions cannot be recruited to using Web Recruitment. Please use a CHRIS/10 for:

- Proctors
- Archaeological staff working at the Cambridge Archaeological Unit
- Library Invigilators on Invigilator Rates
- Associate Lecturers

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