



# HIRESERVE HIRING MANAGER PORTAL USER GUIDE

# **CONTENTS**

Please click on the page number to take you directly to the section you need.

ACTION	PAGE
Logging in	<u>3</u>
Getting started	<u>3</u>
Creating a job	<u>3</u>
Adding job approvers	<u>4</u>
Adding an advert	<u>5</u>
Adding documents	<u>6</u>
Selecting interview panel members	<u>Z</u>
Submitting for approval	<u>8</u>
Assessing candidates	<u>10</u>
Identifying candidates who have a disability (Disability Confident Flag)	<u>10</u>
Proceeding and rejecting candidates following shortlisting	<u>13</u>
Creating an interview schedule	<u>14</u>
Viewing a finalised interview schedule	<u>16</u>
Amending a finalised interview schedule	17
Proceeding and rejecting candidates following interview	17
Making an offer to successful candidate(s)	17
Contacting and closing down unsuccessful candidates	<u>18</u>

# LOGGING IN

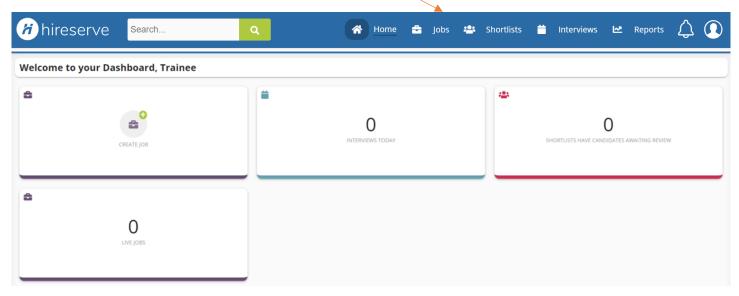
You can access the system by clicking on the link below. We are using Single Sign-On, therefore you will not be required to set up a username or password. *Please note that training is required prior to being granted access to the system*.

# https://ljmu-ats-sso.hireserve.com

You can also access Hireserve from the JMU App Player and the Quick Links on the Staff Intranet pages.

#### **GETTING STARTED**

You can access the various areas of the system via the menu options at the top of the screen as well as the various tiles on the dashboard as below:



#### **CREATING A JOB**

Click on the 'CREATE JOB' tile:

<i>H</i> hireserve	Search Q			🕷 Home 🚔 jobs 😂 Sh	ortlists 🚔 Interviews 🗠 Reports 🔔 🚺
Welcome to y	our Dashboard, Trainee				
4	CREATE JOB	-	<b>O</b> INTERVIEWS TODAY	SHORTLISTS HAVE (	O CANDIDATES AWAITING REVIEW
â	O Live Jobs				

#### JOB ADVERT DATES

# **Create Job**

	Date On		Date Off	Publish
Intranet	04/07/2022	Ö	22/07/2022	
Internet	04/07/2022	Ö	22/07/2022	

At the top of the screen in the 'Date On' and 'Date Off' boxes, enter the dates you would like your job to be advertised on and the desired closing date.

- **Date On** is the anticipated publishing date this should be future dated and should account for review and approval lead times.
- Date Off is the closing date (normally no less than 2 weeks from the actual publish date)

Intranet: adverts appearing on the Intranet (LJMU Staff Pages) can only be seen by LJMU employees.

Internet: adverts also appearing on the Internet can be seen by anyone via the LIMU external website.

Please ensure the 'Publish' toggle remains off (grey). HR will publish once the vacancy details have been reviewed and approved.

# JOB OVERVIEW

Add details of vacancy to be advertised. Leave Hiring Manager as default unless you are inputting a job on behalf of somebody else, if the Hiring Manager isn't appearing in the list please ask the individual to register for a Hiring Manager Portal briefing session via the <u>Staff Development Calendar</u> following which, we will be able to set them up with an account. If you do need to change the Hiring Manager as you are adding the job on behalf of someone else, click the drop-down arrow and then type the surname and select the appropriate person.

Job Details	Job Roles	Classifications
Job Title *	Lecturer/Senior Lecturer	
Hiring Manager *	Larsen, Neil	▼
Status	Draft	•
Advertise via redeployment only		
Number of openings	1	(0 hired)
Application Form *	App Form with Docs 2021 (New)	•
Pre-employment checks required	Checks with DBS	•

If your role is to be ringfenced to candidates on the redeployment register, please tick the 'Advertise via redeployment only' checkbox (adverts are automatically placed on redeployment via the HR team, but if you are aware you have redeployees in your team, you can request ringfencing via use of this checkbox).

Choose the relevant application form that you would like candidates to use to apply. This could be '**App Form with Docs 2021**' which will allow additional document uploads i.e. CV's or '**App Form No docs**' which will be just an application form to review and no additional uploads permitted. If you are in any doubt as to which application format to use, please speak to a member of the HR team who will advise accordingly.

#### JOB APPROVERS

Click on the '**Job Approvers**' tab and choose your 'Business Partner' from the drop-down list. If you are aware your Business Partner is on leave, please select the Business Partner that you have been advised to contact in their absence. *HR can reassign approval workflows if you become aware that your Business Partner is not available after the vacancy has been submitted for approval*.

# JOB DETAILS

Click on next tab '**Job Details**', fill in all required fields, those marked with an asterisk are mandatory and you will not be able to progress until all of these fields are completed:

		Job Roles		Classifications
School/Dept *			Liverpool School of Art and Design	•
Establishment No *			ABC12345	
Contract Type *			Permanent	•
Job Type *			Academic	•
Grade *			Prof 1	•
Salary *			45,000	
Hours *			Full Time	•
DBS Required *			No	-
Where would you like th	is post to be advertised? *		jobs.ac.uk	0
Cost Centre for paid adv	vertising			
Athena Swan Award (if a	applicable)		None	

For advertising purposes, unless an internally only advert is requested, your adverts will appear automatically on LJMU career pages, 3 x diversity job boards, LinkedIn, Twitter and jobs.ac.uk (if an academic or professional role – research roles are subject to the jobs.ac.uk charge therefore this will be discussed with you at advert stage). Please specify any additional 3<sup>rd</sup> party advertising you would like or speak to HR if you would like to discuss recommendations.

Please note the fields presented to you may differ slightly from those in the image above as further developments and improvements are made to the system.

#### ADDING AN ADVERT

Click on next tab 'Job Text'. There are three parts to this tab, Job Summary (We are not currently using this feature), Advert Text, and Standard Paragraphs. Click Advert Text (as above, ignore the Job Summary option) and enter any key information you would like to have in the advert relating to the role, HR will draft the final advert for you incorporating standard templates covering an introduction to LJMU, the Faculty/School/Department and benefits of working for LJMU. Please note that if you are pasting information here from another document, you will need to use the paste keyboard shortcut (CTRL + V) as using the mouse will not work.

Job Details		Job Roles	Classifications
Job Summary	Publish Paragraph To	Both	•
Job Advert			
Standard Paragraphs			
	Path: p Publish Paragraph To	Both	•
	Party p		

If you would like the same Job Advert details on both internal and external sites just add text into the top '**Publish Paragraph to**' box and leave the drop down as '**Both**', alternatively if you want different wording, you can change each advert box to 'Internet' and 'Intranet' and complete both boxes with relevant information for each. Check if any available **Standard Paragraphs** need to be enabled (i.e. if a fixed term research post). The standard paragraph relating to the closing date for applications is checked by default as applies to all roles.

Once done click green 'Save' button at top of screen:

🕋 Home	😑 Jobs	😬 Shortlists	interviews	🗠 Reports	<u></u>
				Save O	ptions 🗸
				Not live	

This will then generate your Vacancy Reference Number:

Lecturer/Senior Lecturer / 2068						
	Date On	Date Off	Publish			
Intranet	04/07/2022	22/07/2022				
Internet	04/07/2022	22/07/2022				

#### ADDING DOCUMENTS

Here you can upload your Job Description document. Add documents by clicking on 'Options' then 'Documents'.

😤 Home 💼 Jobs 😩 Shortlists 🎽 Interview		🗠 Reports 🛆 🚺	
🐪 Horne 🚍 jobs 🖶 snortiists 📕 interview	vs	Save Options ~	
		Create new job	
		Copy job	
		Delete	
		Preview Internet	
	-	Preview Intranet	
assifications	Job -	< View Job PDF	
		< Workflows	
		Question Scoring	
		Job Specific Questions	
		Assessment Criteria	
		Assessment Criteria Interviewer selector	

Click 'Add a document', complete required fields then click 'Choose file' to browse and select appropriate file, repeat if you need to attach multiple documents. For Job Descriptions, please ensure you attach Word versions rather than PDF in case HR need to edit prior to publishing.

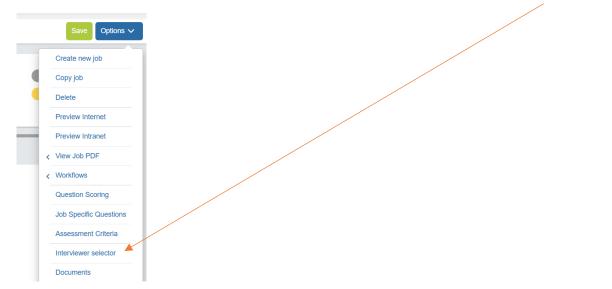
Ensure 'Show to candidate' is ticked (unless the document you are uploading is for HR information only), but please ignore the 'Send to agency' checkbox as this isn't required. Once completed click the green 'Save' button. Once saved click 'Back to Job Details', top right of screen.

Attach a new document

Description	* JD
Туре	• Job Description 🗸
Show to candidate	
Send to agency	
File to Upload	* Choose file Hiring Manar Guide.docx

# **SELECTING INTERVIEW PANEL MEMBERS**

Now you can add the members of the interview panel by clicking 'Options' then 'Interview Selector':



In the Interviewers 'Search users' box, start typing the surname of the panel member you need and wait a second for the system to find them, once they appear you click the green + button to add them, they will then appear in the 'Selected interviewers' section. If your panel member doesn't appear, please direct them to the <u>Staff Development</u> Calendar to attend a Hiring Manager Portal briefing session. Following which, access to the portal will be granted. You can select who will be the Chair of the panel by clicking in the checkbox after the panel member name.

					/	
Interviewers						×
Search users:	larsen					
Available interview	ers					
Name		Branch		Username		
💿 Larsen, Neil				008748		
Selected interviewe	ers					
Name		Chair 📕	Branch		Username	
🗙 Kayll, Michelle	(9				M.L.KAYLL	
💢 Larsen, Neil(32	28				008748	
					Cancel	Ok

When all panel members have been added click 'Ok' and then 'Save' the job.

# SUBMITTING FOR APPROVAL

Once you are happy that all job details are correct submit for approval by clicking '**Options**' then hover over '**Submit for Approval**' and click on '**Vacancy Approval**':



You will be prompted to confirm that you definitely want to do this (so have the chance to go back to amend anything if needed). Once this has been confirmed you will notice that the status of the job has changed to 'Job approval pending'. This approval will then be directed to the Business Partner you have selected earlier on in the job creation process.

Please note that once you have submitted your job, you won't be able to make any amendments to it as it is in the approval chain and will be reviewed as was originally submitted. If you need to make any changes to the role following submission of the vacancy, please speak to HR.

삼 Home	🔒 Jobs	😤 Shortlist	s 🧮 Interviews	🗠 Reports	$\Diamond$ ()
				Save	Options 🗸
				Not live Job approval pe	nding

You can view the status of any of your jobs by clicking on '**Jobs**' briefcase icon from the homescreen or the '**My Jobs**' tile on the dashboard (*you may need to amend the filters to view vacancies at different stages in the process*)

Home	🔒 Jobs	😬 Shortlists	📋 Interviews	Reports	$\Diamond$ ()

Once the vacancy is approved by HR you will receive a notification in the system, this will show against the 'bell' icon at the top right of your screen. You will also receive an email notification to your inbox.

Home	÷	Jobs	*	Shortlists	=	Interviews	M	Reports	$\mathcal{L}^{0}$

When the vacancy has been published this will show on your dashboard, in the '**MY JOBS**' tile, and the job will also be updated to show as being 'Live' in your 'Jobs' tab.



#### ASSESSING CANDIDATES

Once candidates have started applying for the vacancy a manager can view the applicants by clicking on the '**Shortlists**' tab. All vacancies that you own, or have been granted access to as a panel member will appear in here. If you have lots of jobs and need to search for the role, you can search by job reference number or job title, you can rearrange the **order** of the list or you can switch between ascending / descending by clicking on the '**Sort**' icon:

😤 Home	=	Jobs	*	Shortlists		Interviews	Reports	۵	
Search					Orde Unr		ate quant 🔹	t₽	T

Once you have the vacancy that you need, you can click 'View candidates'

	interviews 🗠 Jobs 😬 Shortlists 🚔 Interviews 🗠 Reports	$\Diamond$ ()
	Order by Unrated candidate quant 🝷 1	₹ ▼
Living - Reject Test / 2042 Reject Test (2042) Shortlist owner: Trainee 2	Unrated cand	SHARED
2 still in process	Progress Hold Reject	• 0 • 2 • 0
still in process	Review View job details View o	• 0 candidates

You will now be taken to the 'Candidate Grid' which will show you a list all applications received to date.

**Important:** If a candidate has indicated that they have a disability that they wish to be taken into account, a green tick will appear in the 'Disability Confident Flag' column. They must be shortlisted if they meet <u>all</u> of the essential criteria i.e. they cannot be filtered out based on desirable criteria if your shortlist is longer than you would like.

Enter keywords Q			_	FILTER.NAME.	Select recommendation	•
	CANDIDATE_NAME	USER_TRACK_TYPE	APPLIC_TRACK_DATE	AUTO_ELIG_FOR_INTVW_FLAG	SCORE_OVERVIEW	ASS
	Larsen, Neil	T02 - Application Received (on-line)	20/06/2023	*		

These candidates can now be assessed.

Click the 'three dots' (these may appear to the right of the screen) and choose 'Assess Candidate' (the 'traffic light' decision system will initially default all applicants to an amber 'pause' status).

Rate candidate       iii       T02 - Application Received (on-line)       20/06/2023         View candidate history       Image: Candidate Detail screen       Email       T02 - Application Received (on-line)       20/06/2023         Image: Assess candidate       Financial       T02 - Application Received (on-line)       20/06/2023       -	ER_TRACK_TYPE APPLIC_TRACK_DATE AUTO_ELIG_FOR_INT	NTVW_FLAG
Candidate Detail screen charlie T02 - Application Received (on-line) 20/06/2023 -	2 - Application Received (on-line) 20/06/2023	
🕕 Assess candidate	2 - Application Received (on-line) 20/06/2023 -	
Q View assessment information		

A preview of their application form will appear. **Important: Any additional documents submitted by the candidate will appear in the drop-down box**. The JD for the role will always appear here too so you can refer to it if needed:

Previous     Next	Select candidate Decision (1)		
Rate candidate Candid	te history Assess Candidate Assessment information		
doc_9340754_20-06-2023.pdf (APP_			
doc_9340754_20-06-2023.pdf (APP_F)	A	Candidate Assessment	30
A2637IN Job Description.doc (JOB DE	CRIPTION)	candidate Assessment	
LJMU		Communication skills	
Application from	Larsen, Neil	*	
E-mail Address	n.larsen@ljmu.ac.uk	Fully met 🗸 🖉	
Job	Admin Officer / 2153	Finish	
Document Type	Application Form	Pinish	

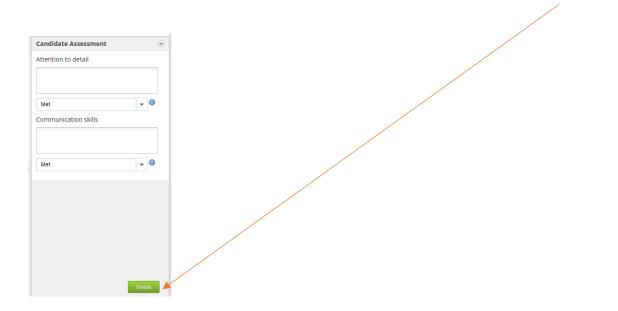
On the right-hand side of the screen, you can carry out an assessment of the candidate against the criteria (which HR will have added at the vacancy approval stage), by adding any notes then choosing the appropriate assessment option from the drop-down lists from options *Criteria Exceeded, Criteria Met, Criteria Partially Met and Criteria Not Met* (you can expand the width of this assessment column if it helps by clicking and dragging the left margin).

Candidate Assess	ment		30
communication sk	ills		
Good communication examples given of fac and other written com	e-to-face, ema	rated, it, in-person	
Fully met			
Exceeded			
Fully met			1
Partly met			
Not met			
Fully met		_ 0	

Please be mindful of clicking on 'Save' regularly at the bottom of the screen to avoid loss of information (a yellow warning triangle  $\triangleq$  will appear if unsaved information has been added) and then make your individual 'Decision' by choosing the appropriate option, note that this <u>does not</u> progress or reject the applicant at this stage.

9391398		
Previous     Ne	xt 🕨 🗌 Select candidate Decision 🖉 🕕 🖨	
Rate candidate	Candidate history Assess Candidate Assessment information	
doc_9391398_21-03-2	022.pdf (APP_FORM)	

You can then click '**Next**' to move to the next candidate and repeat the process, once complete click the '**Finish**' button (*this will just take you back to the candidate grid, it doesn't confirm that all shortlisting is finished*):



If you click the 'three dots' next to the applicant and choose '**Rate Candidate**' (or select the '**Rate Candidate**' tab), you can also add any notes you wish to in the **Comments** box, then click '**Add comment**', this will be visible to the hiring manager and they can respond (for example if you have a question when shortlisting):

ious		ndidate history	Assess Candidate	Assessment inform	nation		<b>`</b>		
andidate id 1	9391398	8					$\backslash$	There is	re no comments to
Documents		Document type	Document descript	System Doc Type	Document name	Size		a com	ment to start the co
	D	Application Form	PDF application for	APP_FORM	doc_9391398_21-03-2022.pdf	5 KB			
							$\langle \rangle$		
							$\sim$		
			A ALL CARE						
	I< <	•	>>I   C Refre	ih data			Displ	aying 1 - of 1	
	1< <	•	>>   C Refre	ah <mark>data</mark>			Displ	aying 1 - v of 1	
	1< <	•	- > >I   Ĉ Refre	th data			Displ	aying 1 - Lof 1	
	1< <	•	>> > C Refre	ah data			Displ	aying t • (of t	
	1< <	•	->> >  C Refre	ih data			Displ	aying 1 - (# 1	
	1< <	•	Refre	ih data			Displ	19/18 1 (11)	
	1< <	•	Refre	ih data			Disp	alord J. Sol.	<u></u>
	1< <	•	- > >>   C Refre	h data			Disp	aver, but	

Please note all panel members will also be able to do this via their portal. **Important:** *Please be mindful of data protection and that candidates would have the right to see any information written about them in the system should they submit a Data Subject Access Request. Information added here should be objective and not negative or discriminatory in any way.* 

Once your shortlisting is completed, in your candidate folder, you can sort candidates by 'Assessor Application Score' to see which candidates have scored most highly and along with the 'Score Overview' traffic light decision system, may help you come to a decision more quickly as a panel of who you would like to progress/reject or those candidates where there are clear differences of opinion that require further discussion.

You can also sort by candidates who have identified a disability to check that these are given appropriate scrutiny by clicking the 'Disability Confident Flag' column heading.

Sta	atus:	SHA	RED, Acces	s mode: (	OWNER, Shortlist ow	ner: Trainee 2 🗸 🗸							
	Enter	keywa	ords Q									FILTER	NAME. Select recommend
C					CANDIDATE_NAME	USER_TRACK_TYPE	APPLIC_TRACK_DATE	SCORE	Employee	AUT LIG_FOR_INTWUFLAG		ASSESSOR_APPLIC_SCORE	ASSESSOR_INT_SCORE
e	2	. (	Deck	ilon 🤣	9340754	T02 - Application Received (on-line)	21/03/2022	0			<u>0</u> 00	****	****
C		: (	Deck	ilon 😑	9340736	T02 - Application Received (on-line)	21/03/2022	o			•••	****	****
e	2		Deck	ilon 🤣	9391398	T02 - Application Received (on-line)	21/03/2022	0			00	****	****

# PROCEEDING AND REJECTING CANDIDATES FOLLOWING SHORTLISTING

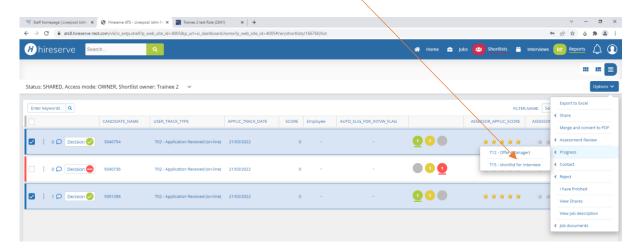
Please note, only the person specified as Hiring Manager in the system can proceed and reject candidates in the system and this should only be done once the advert has closed for applications.

# **Progressing Shortlisted Candidates**

Put a tick in the checkbox next to the candidate(s) that you would like to invite to interview (you can opt to select all by ticking the checkbox in the column header and untick any you don't want to progress if this is easier):

Status: SHARED, Access me	le: OWNER, Shortlist owr	ner: Trainee 2 🗸 🗸							
Enter keyword Q								FILTER	NAME. Select recommenda
	CANDIDATE_NAME	USER_TRACK_TYPE	APPLIC_TRACK_DATE	SCORE	Employee	AUTO_ELIG_FOR_INTVW_FLAG		ASSESSOR_APPLIC_SCORE	ASSESSOR_INT_SCORE
	9340754	T02 - Application Received (on-line)	21/03/2022	0	-	-	000	****	****
	9340736	T02 - Application Received (on-line)	21/03/2022	0	-	-	• • •	****	****
1 Decision	9391398	T02 - Application Received (on-line)	21/03/2022	0			<u>0</u> 00	****	****
-									

Click '**Options**', hover over '**Progress**' then select '**T15** – **shortlist for interview**' – this does not generate any correspondence with selected candidates at this stage but puts them in a hold 'shortlisted' status.



# **Rejecting Unsuccessful Applicants**

To reject the unsuccessful applicants, click on '**Options**' then hover over '**Reject**' and choose '**T04 – Rejection following Manager shortlisting**'. Again, you can opt to select all by ticking the checkbox in the column header and untick any you are progressing which is particularly useful if you have received a high volume of applications that you won't be taking forward.

When you have selected the '**Rejection following manager shortlisting**' status, you will see a preview of the email that will be sent to the unsuccessful candidate(s), this will be pre-populated with the standard response, however you are able to edit this with any further relevant information if necessary i.e. a contact name if feedback is being offered at this stage or confirmation that you won't be able to offer any further feedback at this stage in the process. *Please note the same email will be sent to all candidates selected in the previous screen so do not personalise it with anything specific to one candidate.* Once completed click on '**Continue**' to send the emails.

The emails will come from the logged in user and be set to reply to the same person by default (unless a customised email which will be sent from HR). This is a free text field and can be changed to any email address(es) you would like:

Candidate Folder Status Summary	
Job	Lecturer/Senior Lecturer/2068
Tracking Type	T04 - Rejection following Manager shortlisting
Folder	Living - Lecturer/Senior Lecturer / 2068
Correspondence	
From	▪ n.larsen@ljmu.ac.uk
Subject	Application Update - [job_title] [refno]
Cc	
Bcc	
Reply-to	n.larsen@ljmu.ac.uk
Email body	Dear [title] [last_name]
	Thank you for your application for the above position and for your patience during the selection process. We do appreciate the time and effort taken in making your application.
70,000	Unfortunately, however, the shortlisting panel, after careful consideration, have decided not to shortlist you on this occasion. We hope you are not too disappointed
723/3900	
Preview email Continue	

Back in the candidate folder, you will notice that rejected candidates' statuses will have now changed. You can hide them by clicking on the checkbox at the top right hand of the screen that says 'Live Candidates'

#### **CREATING AN INTERVIEW SCHEDULE**

You will now need to define your interview schedule to progress your shortlisted candiates. Click on the 'Interviews' tab and choose 'View all my schedules' – a template schedule will have automatically created for your role:

										$\wedge \circ$
Â	Home	-	Jobs	***	Shortlists	Ë	Interviews	2	Reports	$\Diamond$ $\bigcirc$

Click 'View schedule details' for the appropriate job (if you have multiple vacancies, you can use the 'Search' box to find the relevant one by inputting either the vacancy reference number or job title):

Interview schedules	View my interviews Create sc	thedule C Search
<ul><li>Trainee 2 test Role (2041)</li><li>Hiring manager: Trainee 2</li></ul>		Planned
~		View schedule details

To set up your slots for the interviews, click 'Add multiple slots' on the following page:

Interview Schedule - Trainee 2 test Role (2044)		Save Finalise
0 Total slots	0 Booled stols	Planned Schedule status
Interview information	Interview slots	Schedule log
No slots have been created for this schedule		Add multiple slots Add new candidate
Candidates		
No candidates have been allocated to this schedule		

You can now enter details of the interviews schedule by populating the fields that appear:

Date	• 04/04/2022	Ć
Start time	* 10:00	~
Number of slots to create	♦○ Enter manual	ie
End time	* 14:00	~
Duration of interviews (minutes)	* 30	~
Duration of break between interviews (minutes)	* 15	~
Comments		
Default location		
nterviewers	*	

If candidates are required to deliver a presentation and/or undertake additional assessment then you can enter details of this, (plus any other relevant details such as where to report on arrival) in the 'Comments' box, and also select a default location for the interviews from the drop-down list if all taking place in the same location (there is also a Teams option to select in the list if more appropriate).

To add additional Interview panel members (so they are visible to candidates when they receive their invite), click the people icon, search users by surname and when they appear click the green + symbol next to their name to add to the 'Selected interviewers'. If you have external panel members who aren't available to select in the system, you can let candidates know in the comments box who else will be joining the panel.

Click 'Save' and then you will see an overview of the schedule you have created as below and the candidates who are going to be invited to interview. If you need to delete any slots that have been created (i.e. to give a lunch break), you can click on the red (x) icon next to the slot(s) you would like to delete.

					Attendance confin		Remove from sc		
Candidates						Add slot	Add multiple slots	Add new	candidate
× 11/07/2022	10:30 🗸 30 🗸	-	Larsen, Neil Recruitment, ,*	Exchange Station	Q	5 minute test	-	۵	-
× 11/07/2022	09:45 🗸 30 🗸	-	Larsen, Neil Recruitment, ,*	Exchange Station	Q	5 minute test	-	۵	-
⊗ 11/07/2022 📩	09:00 🗸 30 🗸	-	Larsen, Neil Recruitment, ,*	Exchange Station	Q	5 minute test	-	۵	-
Date	Time Duration (minutes		Interviewers	Location	Comr	nents	Conflict status	Book	Releas
Multiple slots have be	en added Undo								
	Interview information			Interview slo	ots		Schedule log		

You can also upload any supporting documentation that candidates might need i.e. test instructions or case study by clicking on the '**Documents**' tab and browsing for the document:

Interview Schedule - Adm	nin Manager (2150)			Save Finalse Options ~
O Total 1	) slots	0 Booked slots		Planned Schedule status
Interview information	on	Interview slots	Documents	Schedule log
Local Vacancy	Document Choose file No file chosen			

You will be presented with a note asking you to confirm that you wish to finalise the interviews and send a confirmation email to shortlisted candidates.

You will then be taken the preview email page which will show you the email to be sent to candidates asking them to log into their portal to select a convenient interview slot. You don't need to edit this email as all the information you entered when setting up the schedule will be available to the candidate when they log in. You can now click '**Save**'. On your **Interview Schedules** dashboard, you should then see the status of this vacancy has changed to '**Finalised**' as below. *Please note, if your interview status is still showing as 'Planned' slots will not be published for candidates. Please contact HR for help if your interviews will not finalise*.

Interview schedules	View my Interviews Create schedule C 2068
Lecturer/Senior Lecturer (2068)	Finalised
~	View schedule details

When a candidate has booked themselves an interview slot you can see this by clicking 'Interviews' then choosing 'View my interviews'

My inter	views	View all my schedules C Search
O Mond	ay 11/07/2022	
1	1/07/2022   09:45 – 10:15 am	<b></b>
<b>a</b>	Lecturer/Senior Lecturer (2068) Matthew Eliot confirmed 09:45 am	
ME	Matthew Eliot	
~		View documents View schedule

You can also see the full schedule and booked/available slots in 'View all my schedules' within the 'Interviews' menu item:

Inter	view information			Interview	slots	Do	cuments	Schedu	e log	
Date	Time	Duration (minutes)	Candidate	Interviewers	Location	Spe	ecial Arrangements	Conflict status	Book	Release
2 17/08/2023	09:00	45	Bakewell, Joan	🚢 Larsen, Neil*	Exchange Station, Titheb		10 minute Excel test. Report to receptio Car park available.	n	-	\$
× 17/08/2023	10:00 🗸	45 🗸	-	👪 Larsen, Neil*	Exchange Station, Tithebari	Q	10 minute Excel test. Report to receptio Car park available.	n	۵	-
× 17/08/2023	13:00 🗸	45 🗸	-	👪 Larsen, Neil*	Exchange Station, Tithebari	Q	10 minute Excel test. Report to receptio Car park available.	n	۵	-
× 18/08/2023	09:00 🗸	45 🗸	-	👪 Larsen, Neil*	Exchange Station, Tithebari	Q	10 minute Excel test. Report to receptio Car park available.	n	۵	-
andidates							Add slot Add m	ultiple slots	Add new ca	andidate
rder by Name			~							
Name		N	lotify on finalise		Has profile	Attendance co	nfirmed	Remove from sch	edule	

## Amending an interview schedule

If a candidate asks for further slot options and you are able to facilitate this, you can amend the schedule. Important: when you start to edit a schedule that has already been finalised, it will revert back to 'Planned' whilst you are working on it and therefore unpublish the interview details temporarily. Once you have made the changes, please remember to 'Finalise' again which will publish the schedule with the amended details for candidates to see.

Click on 'Add Slot' if just one slot is required and add the interview details to the slot, or alternatively, if more than one slot is needed, you can follow the instructions above to 'Add multiple slots' and add the interview details again (including presentation topic etc.). *Please remember to 'Finalise' again once changes have been made*.

Interviews to take place as normal. If you would like to input interview notes directly into the Hiring Manager Portal rather than on an interview assessment form, please speak to the HR Resourcing Team **before your interviews** who will set up the appropriate assessment criteria for you in advance.

#### PROCEEDING AND REJECTING CANDIDATES FOLLOWING INTERVIEW

Following interviews, we advise that all candidates are advised of the outcome verbally and are offered feedback before following the steps below on the system which will generate email correspondence/further action.

You are now able to proceed or reject candidates from this screen (if taking these actions from your dashboard, you can get to the candidate folder by selecting '**Jobs**' then in the tile for the relevant job, selecting '**View Candidates**'.

#### Making an offer to successful candidate(s)

To make an offer put a tick in the box for the appropriate candidate then go to '**Options**', hover over '**Progress**' and choose '**T12 – Proceed to Offer**'

tatus: SHARED, Access mode: !	SHARE, Shortlist owne	er: Trainee 2 🗸 🗸									Options
Enter keywords									FILTER.NAN		o Excel
	CANDIDATE_NAME	USER_TRACK_TYPE	APPLIC_TRACK_DATE	SCORE	Employee	AUTO_ELIG_FOR_INTVW_FLAG		ASSESSOR_APPLIC_SCORE	ASSESSOR_INT_SCORE	< Share	
🖌 i O 🔎 Decision 🤣	Larsen, Neil	T05a - 1st Interview	09/05/2022	0	-	-	2	****	****	< Assess	and convert to PDI
0 Decision 😑	Larsen, Neil	T05a - 1st Interview	09/05/2022	0	-	-	000	****	****	< Progres < Contact < Reject	
0 Decision 😑	Nogood, Neil	T04 - Rejection following Manager shortlisting	09/05/2022	0	-	-	••2	****	****	l have f View Sh	
										View jo	b description
										< Job doc	uments

You will receive a 'Warning' message, if you are happy to proceed click 'OK'. You will then be taken to the '**Candidate Folder Status Summary**' page, you will need to fill in the offer terms here (which are questions you will have previously answered on the HR1 form) and also provide a 'Justification for Appointment' and confirm if relocation expenses are applicable:

Candidate Folder Status Summary	
Job	Run Through Tester/2066
Tracking Type	T12 - Proceed to Offer
Folder	Living - Run Through Tester / 2066
Starting Salary	
FTE Salary (for HR only)	
Line Manager	
Working Pattern (hours by day)	
Hours	
Start Date (subject to checks)	ä
Additional Information	
History record comment 0/3000	
Continue	

Once all fields are completed, please click on '**Continue**' to request approval of these terms from your HR Business Partner (which will happen automatically). Once your Business Partner has approved the request, the Recruitment Team will have everything needed to review the offer terms and prepare formal offer letters and commence pre-employment checks.

### Contacting/closing down unsuccessful candidates following interview

We would always advise you wherever possible to contact candidates who have attended for interview verbally to notify them of the outcome. If you have not been able to speak to candidates, to avoid delay you can send an email via the system.

To notify unsuccessful candidates after interview via email, tick the box next to each of the relevant candidates, click '**Options**', hover over '**Reject**' and choose '**T07 – Rejection following 1**<sup>st</sup> **interview (Send email)**'. Click OK on the warning message as long as you are happy to proceed. Once you have reviewed click '**Continue**'.

If you have spoken to candidates verbally following interview, they do not need to be sent an email, but will need to be closed down in the system. Therefore, click on '**Options**', hover over '**Reject**' and choose '**T07 – Rejection following 1**<sup>st</sup> **interview (No email)**' which will close down applications without sending an email.

# NEXT STEPS

Once you have submitted your successful candidate to HR and closed down your unsuccessful candidates, you do not need to do anything further. The HR Resourcing Team will be in touch to update you on how your new appointment is progressing.

Look out in the future for onboarding functionality and being able to see where your successful candidates' preemployment checks are up to in real-time, directly in the system.

If you require any further support whilst using the Hiring Manager Portal, do not hesitate to contact a member of the HR Resourcing Team via <u>HRAssistant@ljmu.ac.uk</u>.