



PeopleNet Guidance Recruitment Manager Guide

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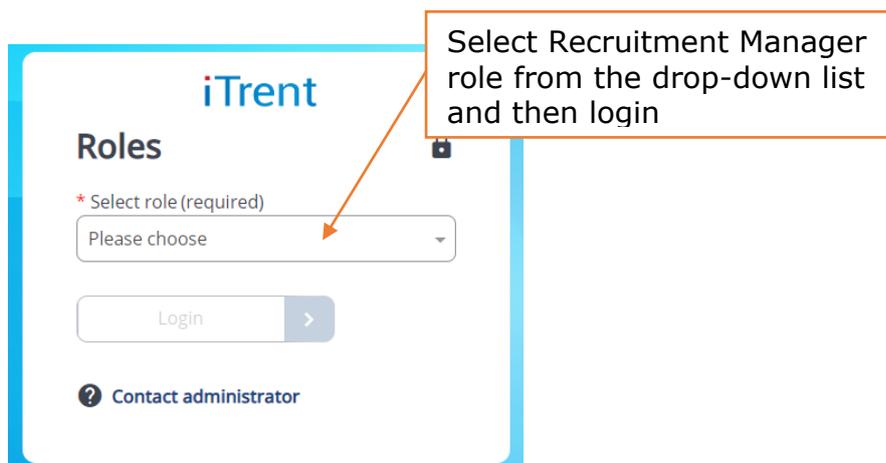
Introduction

If you have line management responsibilities you will be allocated the 'Recruitment Manager' functionality on your PeopleManager profile by the HR team. The following functionality will be available for Recruitment Managers:

- Creating a headcount control business case
- Starting the advertisement process
- Adding screening questions
- Viewing recruitment campaigns
- Viewing applications
- Conducting shortlisting
- Scheduling candidates for interview
- Making an offer
- Running management information reports

Accessing 'Recruitment Manager'

Go to your [People Manager account](#).



If the Recruitment Manager profile does not appear on your drop down then the profile has not been attached to your account. Please contact hrhelpdesk@stmarys.ac.uk to request that the profile is added to your account.

1. Headcount control process

The Headcount control process is an online business case which works by utilising a series of workflows which sits in the background of PeopleNet. The purpose of the business case is to request not only recruitment activity but it is also used for the following purposes:

- Extending a fixed term contract
- Moving a temp to permanent employment
- Requesting a casual
- Increase in FTE

- Agency staff (including contractors)
- Recruiting casual staff

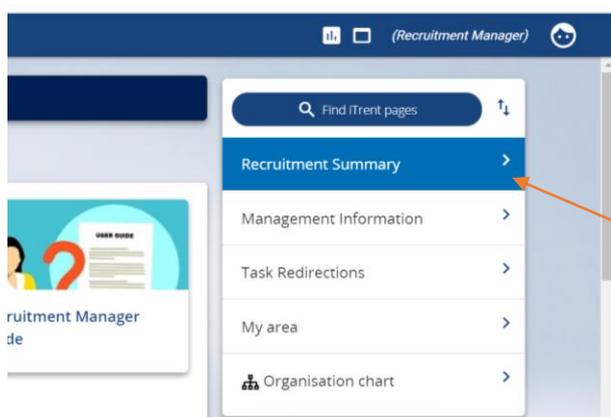
What you request will determine the workflow and the number of approvers needed. You can see the workflows in the table below:

Type of request	Approver 1	Approver 2	Approver 3	Approver 4	Approver 5	Approver 6
New Position Approval (unbudgeted)	HR BP	Finance BP	Dean/Director	SLT	SLT	SLT
Hiring of Existing Position in budget/ Direct replacement	HR BP	Finance BP	Dean/Director	-	-	-
Repurposed Post / In budget	HR BP	Finance BP	Dean/Director	-	-	-
Recruit Casual Staff/agency temp	HR BP	Finance BP	Dean/Director	-	-	-
Recruit consultant / Contractor	HR BP	Finance BP	Dean/Director	SLT	-	-
Temp/ agency to perm (intro fee)	HR BP	Finance BP	Dean/Director	SLT	-	-
FTC to perm	HR BP	Finance BP	Dean/Director	SLT	-	-
Extension to FTC (post in budget headcount)	HR BP	Finance BP	Dean/Director	-	-	-
Change in hours (more than 0.2) in budget	HR BP	Finance BP	Dean/Director	-	-	-
Change in hours (more than 0.2) out of budget	HR BP	Finance BP	Dean/Director	SLT	-	-

1.1. Creating a new business case

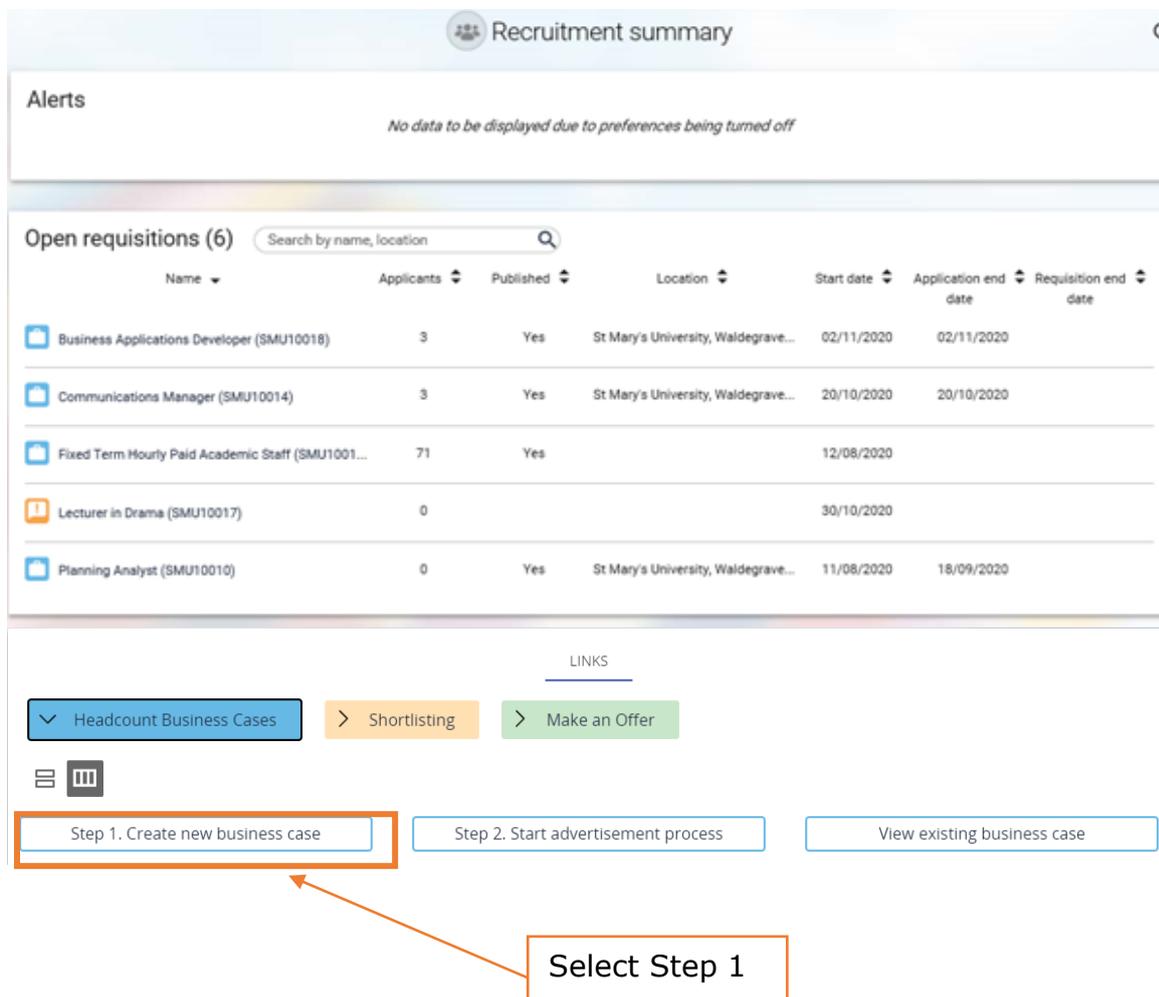
To create a new business case

- Log into your Recruitment Manager profile
- Select the Recruitment Summary tab



Select the Recruitment Summary tab

The below screen should now appear, scroll to the bottom and click on the '**Step 1. Create new business case**' link at the bottom of the Recruitment Summary screen.



A 'Requisitions' page will now appear. To complete your Headcount Control business case please fill in the form. Details on how to complete the business case are noted below.

IMPORTANT NOTE: Saving the form will trigger the approval workflow and you will not be able to amend your requisition once this process starts so please make sure you enter all needed information first time.

2023 RECRUITMENT MANAGER USER GUIDE

Requisition details New

Requisition

Requisition name * Project Manager

Requisition reference

Start date * 18/05/2023

Life cycle * Recruitment

Workflow group * Dept - Human Resources

Recruiting manager * Mr George Wilson

Requisition category/type * Academic Professional Services

Reason for creation * Direct Replacement (in budget)

Enter the current date (Today)

Enter the name of the role here

Select your department from the workflow group

Click on the magnifying glass to select the recruiting manager (yourself)

Please also fill in this box if you are recruiting for maternity cover or backfilling a secondment.

Select the reason for the headcount business case

Just, enter full name of previous post holder

Enter the post title again

Enter date you want role/change to end. Leave blank if permanent or not applicable.

Post Title * Project Manager Test 19

Date you would like the role/change to start

Cost Code

Effective Date * 05/06/2023

End Date

Please enter min and max costs

Current Cost (Band / Spine Point)

Proposed Cost (Min spine point)

Proposed Cost (Max spine point)

Full time equivalent

FTE * 1

Permanent / Fixed-term

If unsure, please consult your Finance Business Partner

In approved budget? * Yes

Are you using agencies to recruit for this role? * No

If you know you want to recruit through a recruitment agency please state yes and state expected costs in the box below. Please note recruitment agencies carry an extra cost which the department will have to fund.

If you are using agencies, state expected agency fee costs here (£)

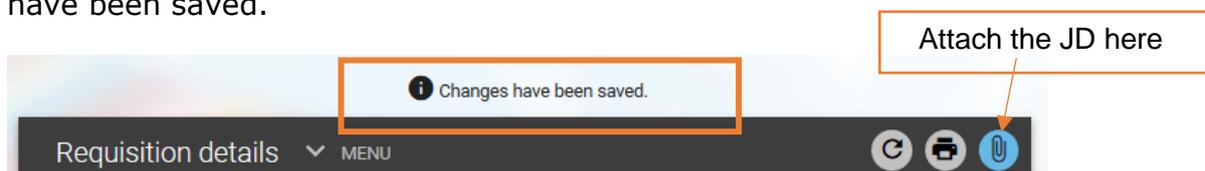
When filling out the Headcount control business case you will need to justify your reasoning/rationale for your request. Please use the following boxes to outline your business case.

	Considerations
--	----------------

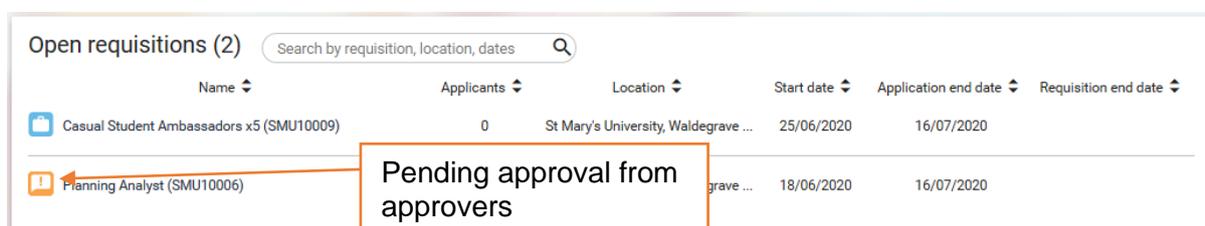
<p>Additional Cost</p>	<ul style="list-style-type: none"> • Appointments under Points Based System will incur costs for Certificate of Sponsorship £200, Immigration Skills Charge £1,000 per year sponsored. • Maternity cover will attract an extra cost. For more information please contact your Finance business partner. • Any other additional costs.
<p>Business case</p>	<p>Please use this space to put forward your business case and the reasons for your request. You may wish to also consider the following:</p> <ul style="list-style-type: none"> • What are you trying to achieve through this request? • How does it link back to Vision 2030 and the strategic aims of the university? • What is a good outcome? • Why do we need this role? • What alternatives have you considered? • Workload of the team • Skills/ knowledge gaps • Gather data to support your request • Highlight the benefits
<p>Financial implications</p>	<ul style="list-style-type: none"> • If in approved budget, provide details. If not in approved budget how will savings/income generation be achieved to fund post. Include costing information.
<p>University impact</p>	<ul style="list-style-type: none"> • What improvements will be made to the team and wider University operation/student experience? • Is this post critical in meeting our regulatory/legal obligations, and if so how?
<p>Any other considerations</p>	<ul style="list-style-type: none"> • Is this a 'difficult to fill post' with a scarce skill set? • Is there a known equality impact across team and band?

	<ul style="list-style-type: none"> Any other additional supporting evidence?
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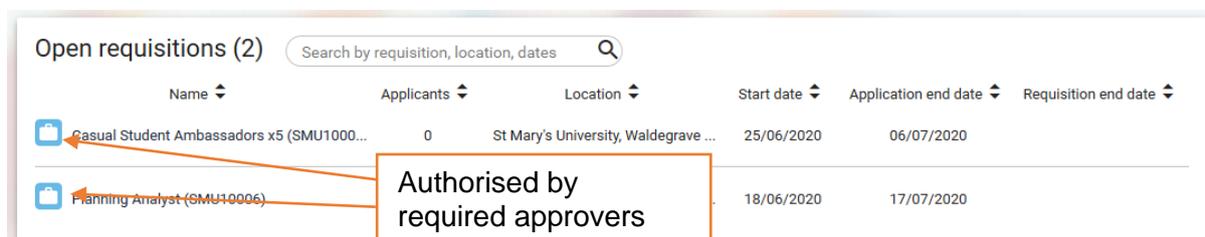
Once you have completed the requisition form, click the green **Save** button at the bottom of the form. **You will not be able to amend the requisition once it's saved.** A notification will appear at the top of the page to confirm changes have been saved.



If you are recruiting then please attach the job description at this stage. You can do this by scrolling to the top of the form and attaching via the paperclip icon. Your requisition will now be visible on the Recruitment Summary screen with an **ORANGE** icon indicating the progress of the requisition:



Once the business case has been approved by the required approvers (see table on page 3), you will be notified by email and the icon on the Recruitment Summary screen will change to **BLUE**:

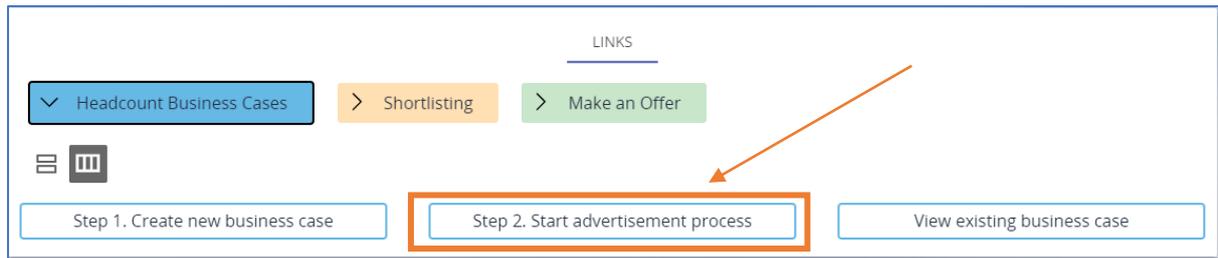


- If you are not intending to recruit then the process ends here. The email notification that you will have received stating that your request has been approved will contain detailed instructions on how to proceed with the next steps.
- If you now need to recruit – carry on reading!

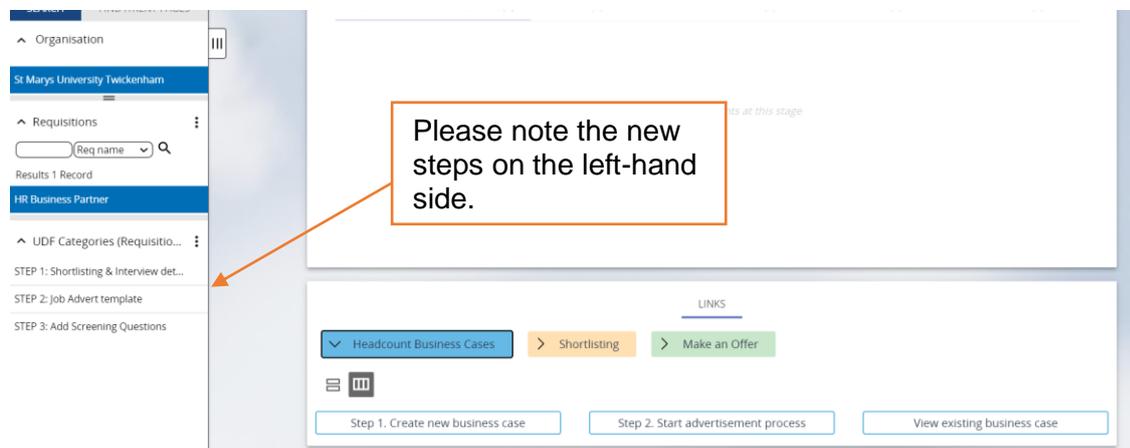
2. Recruitment: Getting your role advertised and live

Once your business case has been approved you can start the process to advertise the role. To upload your job advert text, add shortlisting criteria and

add screening questions, click on the '**Step 2 Start advertisement process**' link at the bottom of the Recruitment Summary screen.



The page will refresh and display as shown below.



Click on '**STEP 1: Shortlisting & Interview details**' to start adding shortlisting criteria for this role and click **SAVE**. This is the information that HR will use to set up the interview and create an application form (if required) for your role.

The screenshot shows the 'UDF Details STEP 1: Shortlisting & Interview details - Domestic Supervisor' form. The form contains the following fields:

- DBS Check Required? * (dropdown menu)
- Anticipated Start Date * (calendar icon)
- Band of Role * (dropdown menu)
- Hours of work * (dropdown menu)
- If part-time, enter FTE (text input)
- Duration (if Fixed Term Contract) (text input)
- If contract is fixed term, please indicate which of the reasons apply (dropdown menu)
- Is the new employee to be integrated within existing departmental/office space? (dropdown menu)
- Where will the position be advertised (text input)
- Expected advert closing date (text input)

- **Shortlisting criteria and creating application form questions**

Shortlisting criteria are the set of factors that you will use to decide who to hire. These factors will be listed on the job description under the 'Person Specification' and will be the Essential and Desirable skills, experience, qualifications that the candidate will need to demonstrate in order to be selected for interview. There are 5 boxes that look like the below:

Shortlist criteria 1 (essential) *	Proven administrative experience
Description for shortlist criteria 1	Please give details of your administrative experience, including examples of administrative tasks you have worked on.
Shortlist criteria 2 (essential) *	Ability to organise and prioritise
Description for shortlist criteria 2	Outline your experience of working to tight deadlines. How do you organise your work to ensure you meet deadlines?

- The smaller box is the shortlist criteria, this is where you will put the skill, experience or qualification that is essential for the role.
- The second larger box is the 'description for shortlist criteria'. This is where you will ask the candidate to demonstrate the criteria. This will appear on the candidate's application form as below:

Application questions

Please give details of your administrative experience, including examples of administrative tasks you have worked on. *** (required)**

Please enter your response here

Outline your experience of working to tight deadlines. How do you organise your work to ensure you meet deadlines? *** (required)**

Please enter your response here

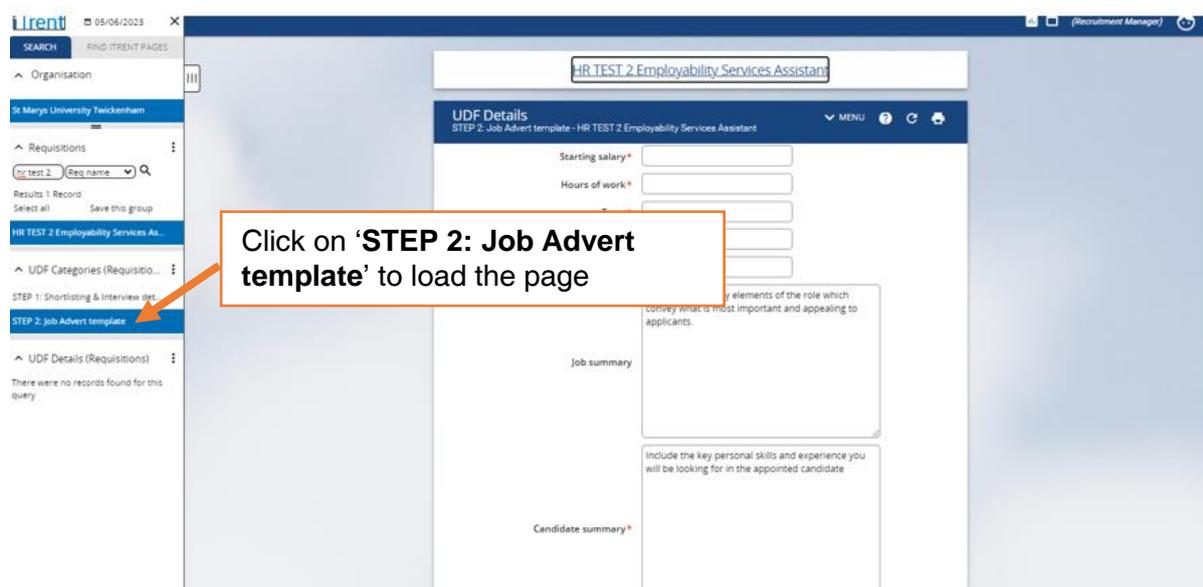
How have you dealt with rapidly changing priorities within a working or educational environment? *** (required)**

Please enter your response here

- The maximum number of characters for each answer is 9999 but if you wish to reduce that then please include this request in the box.
- An application form allows you to cover the relevant criteria quickly and is easy to score, but a CV may uncover details about the candidate which you would never have thought to ask.
- If you don't want to have application form questions and you want a CV and Statement only application then do not fill out the 'description for shortlist' box.

Once you've completed this form and pressed save you can move onto step 2.

Click on '**STEP 2: Job Advert template**' to start completing the job advert for this role and click **SAVE**.



- **Click on Step 3 'Add Screening Questions'**

Screening questions are optional but they may help you to filter out those candidates who do not have the absolute essential criteria that you need for the role. For example, if the role is for a driving instructor, one of your screening questions may ask if the candidate holds a driving licence. If they say no, then they will not be able to continue with the process. Screening questions are asked at the beginning of the process and must be an essential part of the job description. They must be fair and proportionate. You can also ask candidates if they hold the right to work in the UK.

UDF Details STEP 3: Add Screening Questions - Domestic Supervisor

Screening Question 1

Screening Question 2

Add question/prompt for applicant to answer before submitting their application. If they answer NO then they will not be able to submit an application. Questions should be derived from the essential criteria in the job specification.

Add question/prompt for applicant to answer before submitting their application. If they answer NO then they will not be able to submit an application. Questions should be derived from the essential criteria in the job specification.

You can have a maximum of 3 questions. Once you've submitted your questions then click save.

You've now completed the first part of the recruitment process – the HR recruitment team will process your campaign for you and make it live. If you have any queries at this stage please email hrhelpdesk@stmarys.ac.uk.

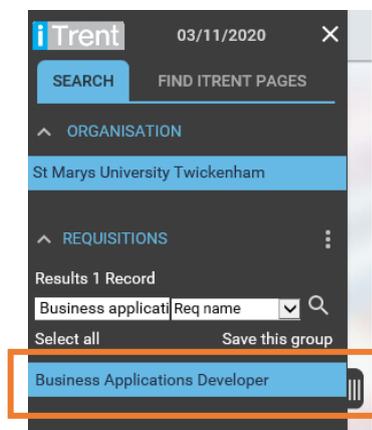
2.1. Viewing your existing business case

If, at any point after you have pressed save, you would like to review your existing business case return to the Recruitment Summary screen by clicking on the navigation button at the top of the Requisition Summary screen

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

Name	Applicants	Published	Location	Start date	Application end date	Requisition end date
Business Applications Developer (SMU10018)	3	Yes	St Mary's University, Waldegrave...	02/11/2020	02/11/2020	
Communications Manager (SMU10014)	3	Yes	St Mary's University, Waldegrave...	20/10/2020	20/10/2020	

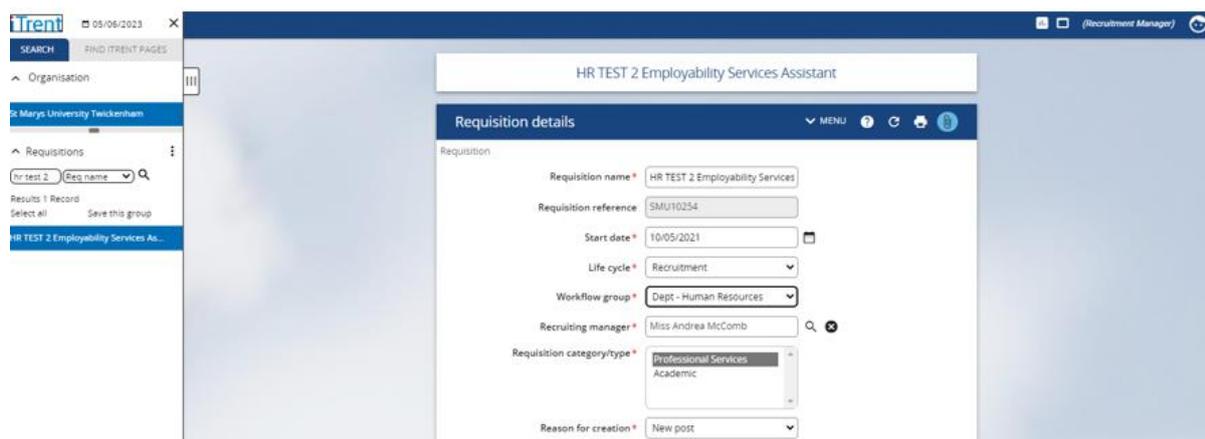
Alternatively, you can perform a search via the left-hand panel search field and then select the requisition you want to view details for:



Scroll down to your available links and select **View Existing Requisition Details** under **Headcount Business Cases**:



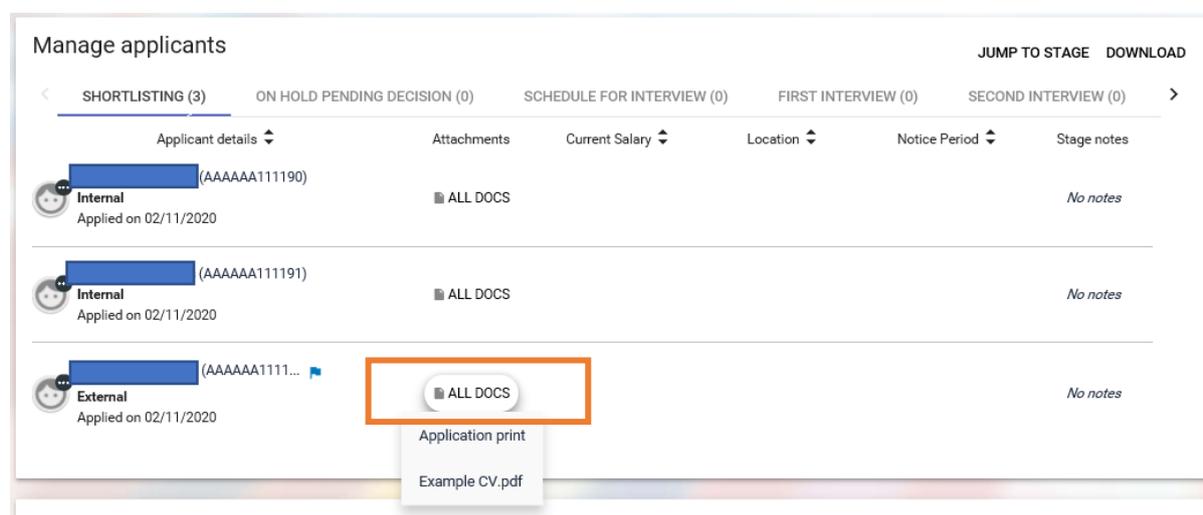
Details of the requisition will display on this page (refer to section 1.2 for more information on this).



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

3. Viewing and downloading Applications

You can view completed applications before the deadline. There are two ways in which you can view and download applications (the second way is shown in section 4). You can download an applicant's application form and any other documents which they have attached with their application from the **Requisition Summary screen**. To do this, select the **ALL DOCS** button next to the applicant's name and the application or attachment you want to download:



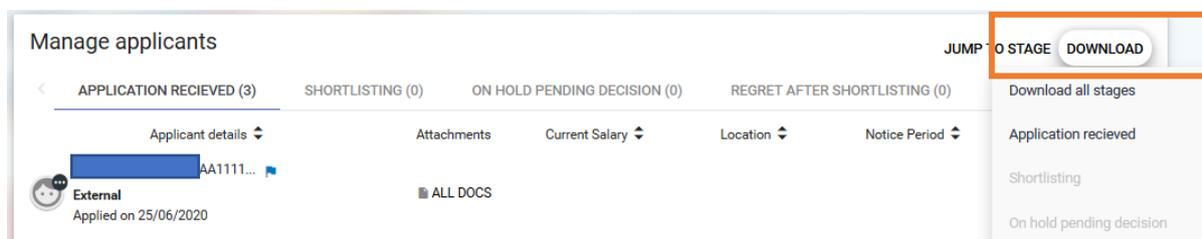
The selected attachment will open a PDF document which can be viewed for shortlisting purposes.

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

If you save applications outside of the recruitment system you must ensure this is not in a shared area and/or password protect the document(s). You will need to ensure that all applications stored outside of the recruitment system are deleted once the recruitment campaign is finished. Failure to do this

could result in a breach of our Data Protection Policy regarding the storage and retention of applicant's information.

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



4. Shortlisting Process

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

4.1. Review Requisition Campaign Summary

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



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

Business Applications Developer

Requisition campaign summary Business Applications Developer MENU

Requisition name [Business Applications Developer \(SMU10018\)](#)

Job title Business Applications Developer

Requisition start date 02/11/2020

Application closing date 02/11/2020

Published Yes

Vacancies 1

Applicants 3

Document attachments

- Business Applications Developer JD_v2.pdf
- Business applications developer advert_v2.docx

+ Applications

Callout boxes:

- This is the advert closing date (points to Application closing date)
- The name is a hyperlink which when clicked will open a new view and display the relevant Requisition details page. (points to Requisition name)
- This field will display Yes if the job has been published to web recruitment. (points to Published)
- This field displays the total number of vacancies for the selected requisition. (points to Vacancies)
- This field displays the total number of applicants for the selected requisition. (points to Applicants)

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

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

Document attachments

- Business Applications Developer JD_v2.pdf
- Business applications developer advert_v2.docx

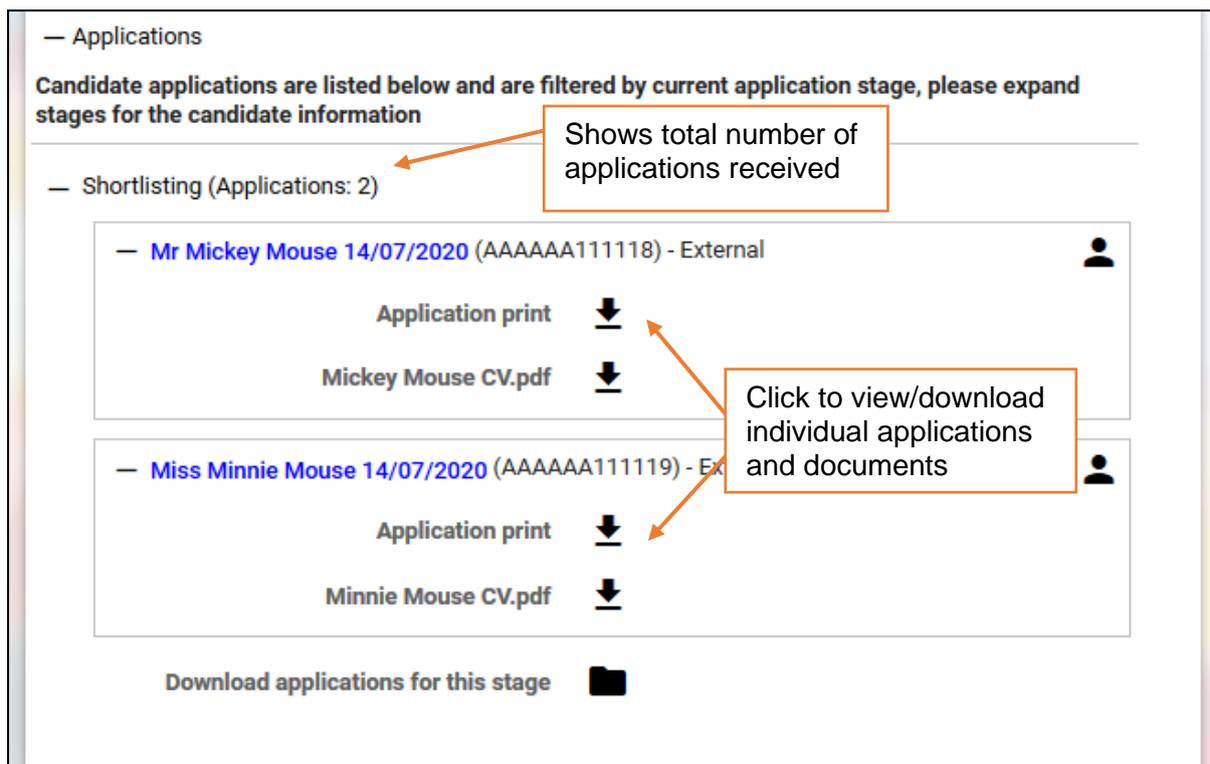
+ Applications

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

- Applications

Candidate applications are listed below and are filtered by current application stage, please expand stages for the candidate information

+ Shortlisting (Applications: 2)

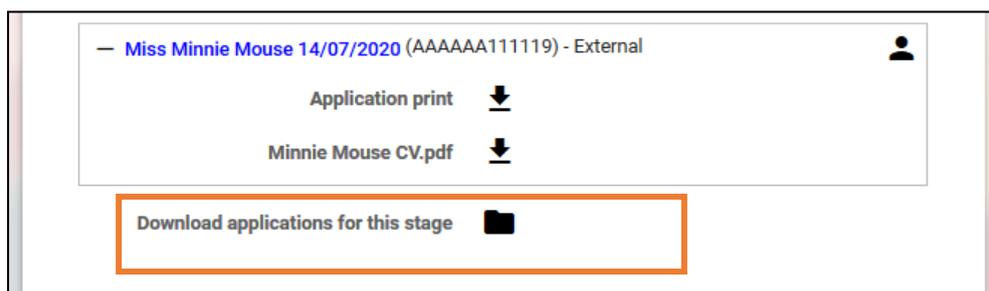


To view an individual application form, click on the button  this will open a PDF document which can be viewed for shortlisting purposes.

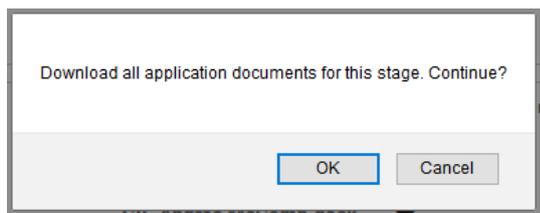
The PDF document can also be printed or saved to an external folder.

4.2. Download All Applications in Bulk

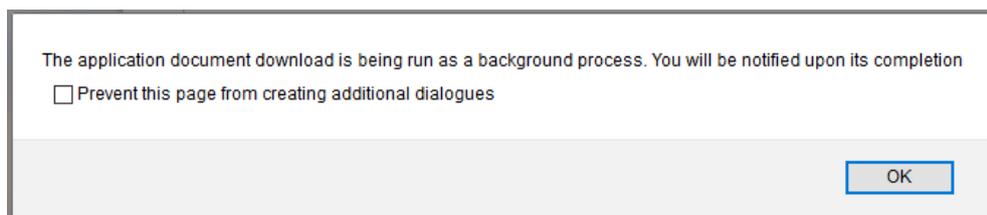
Click on **Download applications for this stage** on the **Requisition Campaign Summary** page to download all candidate application forms and attached documents:



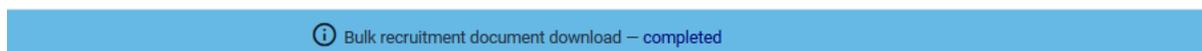
You will be prompted with a confirmation screen asking if you want to continue with the bulk download process:



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



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



An alarm icon will also appear at the top left-hand corner of your screen to notify you when the bulk application download process has completed:



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

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



You will be able to download your document by selecting the 'select all' check box and then clicking on  download button:

Download output All reports

View output from Today

Available report outputs

Report name	Run date & time	Comments	Download	Delete
Recruitment bulk document download	26/06/2023 20:53	HR Administrator (SMU11175) - Stage: Web applicant/shortlisting - Applicants included: 12		<input checked="" type="checkbox"/>

Delete

The applications will be available to open/save as PDF documents stored in a compressed folder in your own 'Downloads' folder on your laptop or PC:

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

Name	Type	Compressed size	Password ...	Size	Ratio
AAAAAA111118APP01	Adobe Acrobat Document	53 KB	No	55 KB	5%
AAAAAA111118ATT02	Adobe Acrobat Document	957 KB	No	1,057 KB	10%
AAAAAA111119APP011	Adobe Acrobat Document	53 KB	No	55 KB	5%
AAAAAA111119ATT022	Adobe Acrobat Document	1,621 KB	No	1,871 KB	14%

4.3. Scoring

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

Record final scores for applicants

To begin shortlisting, navigate to the additional links under the **Requisition Summary screen**. To record scores on the recruitment system, select the **Shortlisting** folder from the available links under the requisition summary screen and click on **2. Enter Final Shortlisting Scores**.



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

Shortlisting question	Shortlisting response	Criteria score	Comments
BAD - Knowledge and Qualifications Qualified to or studying for a degree in computing or a related subject, or equivalent work experience.		2	Degree has minimal computing
BAD - Knowledge and Qualifications 2 Proficiency in the following areas: o MSSQL Server, including SQL Server Profiler o T-SQL stored procedures, functions and triggers o API and web services		3	has used SQL server, but vague on use of other types of servers
BAD - Skills and Abilities Experience of one or more of the		2	Used only one CRM system and use was minimal. Had knowledge but

+ Reviewer: Abraham Lincoln (Total score: 23)
+ Reviewer: John F Kennedy (Total score: 20)

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

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



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

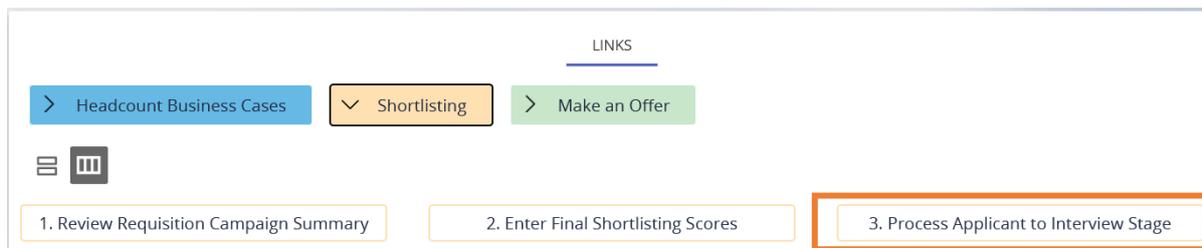
5. Processing your applicants to the interview stage

Once the Recruiting Manager has completed shortlisting on Recruitment Manager, the next step is to move the shortlisted candidates to the next stage

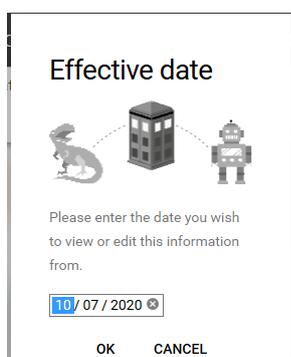
on the recruitment system. **This will allow HR to create and send the invite to interview emails.**

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

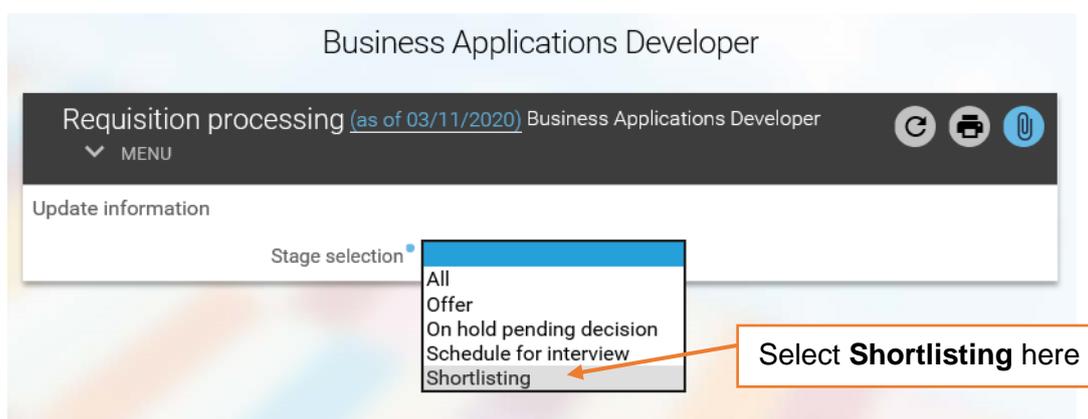
Select the **Shortlisting** folder from the available folders under the Requisition Summary screen and click on **3. Process applicants to interview stage**.



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



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



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

Requisition processing (as of 03/11/2020) Business Applications Developer

Update information

Stage selection **Shortlisting**

Move to **Schedule for interview**

Stage notes

Applicants

Applicant name	Applicant stage	
Mr [REDACTED] (AAAAAA111191)	Shortlisting	<input checked="" type="checkbox"/>
Mrs Jacqueline Kennedy (AAAAAA111197)	Shortlisting	<input checked="" type="checkbox"/>
Mr [REDACTED] (AAAAAA111190)	Shortlisting	<input type="checkbox"/>

SAVE

Selecting this stage will display a list of all applicants at the shortlisting stage of the recruitment campaign

This is the stage that all shortlisted candidates will be moved to once you save this page

Tick the box next to each shortlisted candidate to select them to be invited for interview

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

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

i Changes have been saved.

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

6. Making an offer

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

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

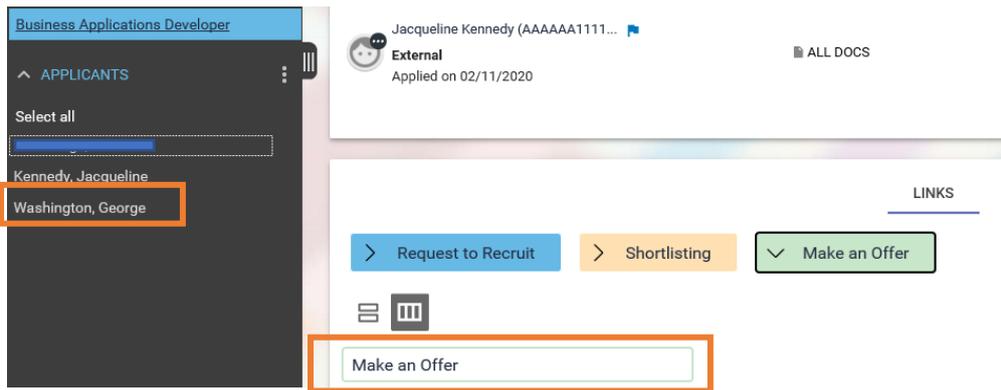
LINKS

> Headcount Business Cases > Shortlisting **Make an Offer**

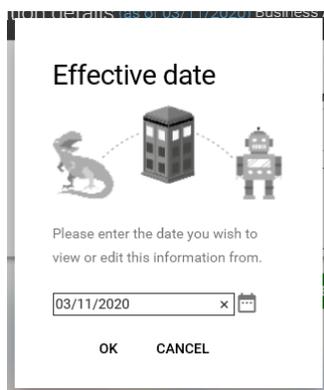
Make an Offer

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

2023 RECRUITMENT MANAGER USER GUIDE

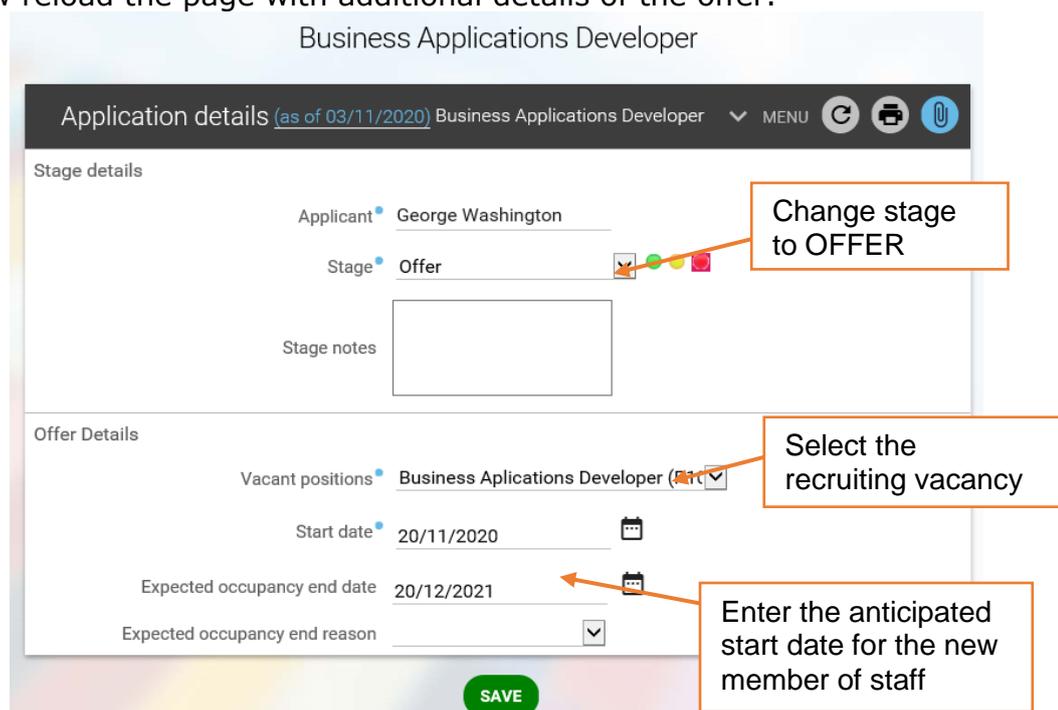


Select the name of the appointed candidate and confirm the effective date (today):



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

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



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

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

 Changes have been saved.

You must email a completed Appointment form to HRhelpdesk@stmarys.ac.uk as soon as you have completed this process on Recruitment Manager. The Appointment form template can be found here: <https://www.stmarys.ac.uk/hr/docs/recruitment/appointment-sheet.docx>

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

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

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

Data Protection

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

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

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

Helpful Contacts

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