



Web Recruitment Release 3, July 2014

Managing vacancies and applicants

HR Systems

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## 1. Introduction to Release 3

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

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

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

Permission to fill a vacancy is then requested and granted in RAS. Once all required permissions for a vacancy have been obtained, it can be advertised on the University Jobs Pages and in external media.

In RAS, a department/institution records whether or not the application method for a vacancy will be using the University's Web Recruitment System. Where the Web Recruitment System is to be used, RAS will:

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

This first release of the Web Recruitment System focused on:

- Allowing applicants to apply on-line via the University Job Opportunities pages;
- Automatically acknowledging applications;
- Allowing recruiters/administrators to manage and record the results of the selection process;
- Allowing recruiters to view the data; and
- Transferring the successful applicant(s) into CHRIS.

The second release of the Web Recruitment System focused on:

- Allowing applicants to copy personal details, qualifications and employment history from a previous application;
- Allowing recruiters to send rejection emails and letters to applicants;
- Allowing recruiters to send electronic and manual reference requests;
- Allowing referees to upload their reference into the system.

Release 3 of the Web Recruitment System focuses on:

- Allowing recruiters to select and email applicants (at Offer stage) who need to provide information for a Tier 2 Certificate of Sponsorship,
- Allowing applicants to log back into their Web Recruitment account to enter the additional Tier 2 CoS information,
- Allowing recruiters to download the applicant details required for a Tier 2 CoS so that it can be attached to the rest of the CoS application and submitted to the Compliance Team for processing,
- Automated marking of an application as eligible for purging 12 months after the vacancy closes (including extended deletion dates for those vacancies where CoS retention policies apply),
- Allowing Super Users to mark a vacancy as a purging exception,
- Automated deletion of un-submitted applications two months after the vacancy closing date,
- Retaining anonymised data for future trend analysis and management reporting,
- Allowing applicants to enter basic disclosure information when a vacancy has a basic disclosure check selected within new RAS,
- Generating lists of applicant information from within the Web Recruitment application, selecting fields, saving criteria and exporting results to Excel (subject to normal vacancy security), and
- Allowing recruiters to access PDFs using bookmarked pages so that they can navigate more easily around an applicant pack, moving between applicants and documents.

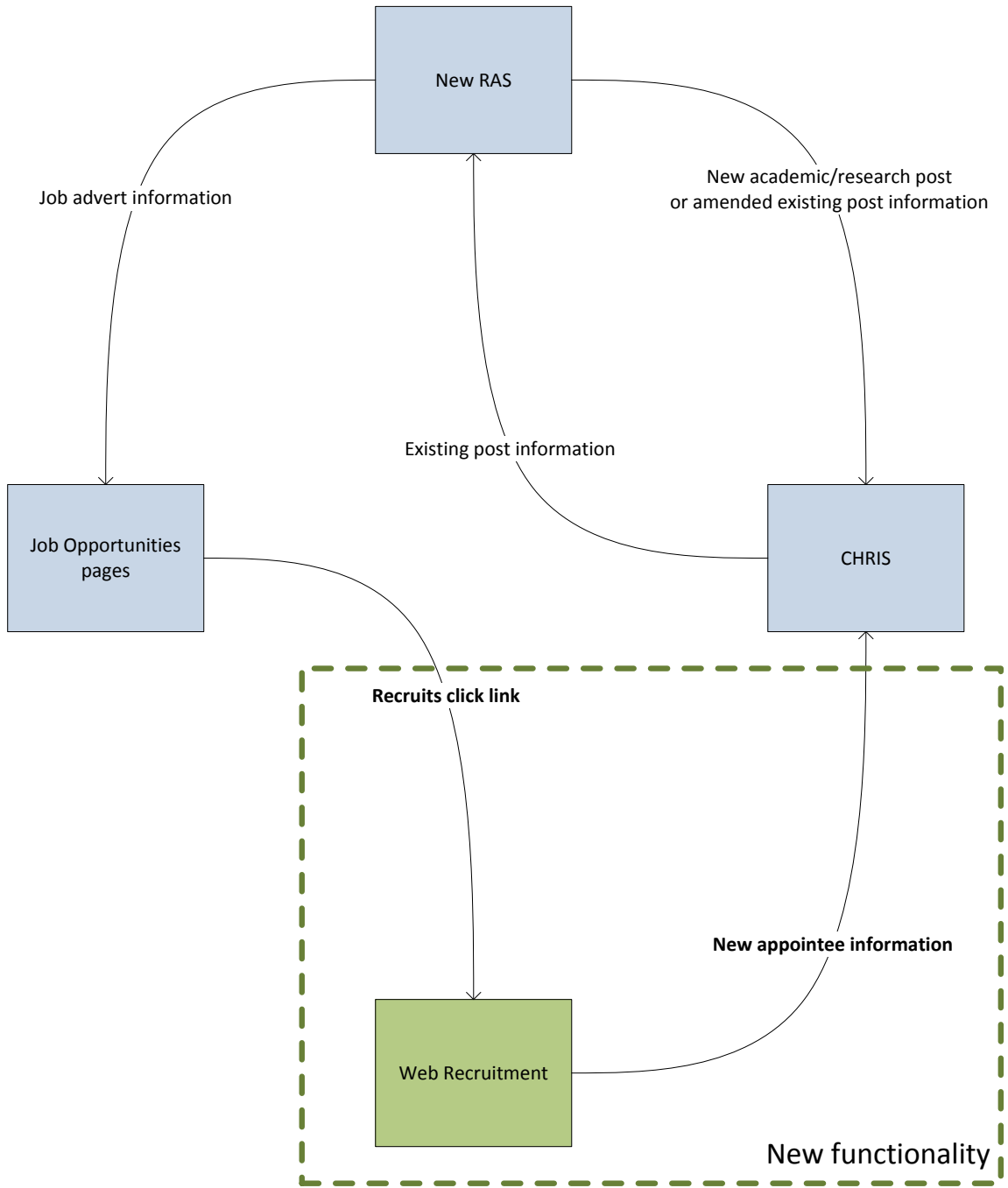
Diagram 1 below shows how the different HR systems link together in the recruitment process.

Departments/institutions should transfer successful applicants to CHRIS using Web Recruitment and can then still record the details of the offer made to the successful applicant in the CHRIS Recruitment Module and return the CHRIS/10(A) Appointment Form with supporting documents to the HR New Appointment Team for processing.

Future releases will add additional functionality, including the ability to record details of the offer within the Web Recruitment System.

Queries relating to Web Recruitment should be directed to the **CHRIS Helpdesk** by emailing [chris.helpdesk@admin.cam.ac.uk](mailto:chris.helpdesk@admin.cam.ac.uk).

Diagram 1: HR systems linkages in the recruitment process



## 2. Web Recruitment – Available Documentation

This manual forms part of the set of documentation for the Web Recruitment application, which also includes:

- Requesting a Certificate of Sponsorship;
- Generating correspondence within Web Recruitment;
- Generating Applicant and Referee reports; and
- An overview of the applicant process.

This guide provides details of the main functions involved in managing vacancies and managing applicant through the selection process.

The above documents and additional information, including a quick reference guide entitled 'How to request a Certificate of Sponsorship', a guide for Selectors, Frequently Asked Questions and release notifications can be found on the [HR Systems Web Pages](#).

### 3. Setting up online applications

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

1. Log on to new RAS and add/find a vacancy. The new RAS user guide can be found at:  
<http://www.admin.cam.ac.uk/offices/misd/services/staff/cam-only/index.shtml>
2. Progress as per the normal new RAS process until you reach Step 2 – Job Details. Here, you will see a new section relating to the application form:

**Application Form**

Form Type  
 CHRIS5  CHRIS6

Apply Online  
 Yes  No

Number of Referees  
 2  3

Click the **Yes** button under **Apply Online** if you would like applications for the vacancy to be made via the new Web Recruitment system.

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

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

**Application Form**

Form Type  
 CHRIS5  CHRIS6

Apply Online  
 Yes  No

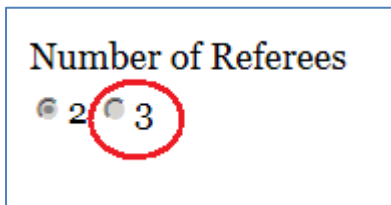
Number of Referees  
 2  3

Click on the appropriate **Form Type**.



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

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



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

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

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

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

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



## Screening Checks ?

NAME	ESSENTIAL BEFORE EMPLOYMENT
DBS Check	
<input type="text" value="No DBS check"/>	<input type="checkbox"/>
<input type="checkbox"/> Disclosure and Barring Service (DBS) - Enhanced	<input type="checkbox"/>
<input type="checkbox"/> Disclosure and Barring Service (DBS) - Standard	<input type="checkbox"/>
<input type="checkbox"/> OH Medical Clearance	<input type="checkbox"/>
<input checked="" type="checkbox"/> Security	<input checked="" type="checkbox"/>

## Clinical Checks

Clinical School checks	
<input type="text" value="No Research passport needed"/>	<input type="checkbox"/>
<input type="checkbox"/> Honorary Clinical Contract	<input type="checkbox"/>
<input type="checkbox"/> NMC Registration	<input type="checkbox"/>

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

## Viewing a vacancy

(KA00956) University Senior Lecturer (Honorary Consultant)

STEP 1  
Job Type
STEP 2  
Job Details
STEP 3  
Funding
STEP 4  
Permission
STEP 5  
Advertisements

No advertisements for current vacancy.

Return
Add advertisement

No further information files for current vacancy.

Add further information file

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

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

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

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

## Library Invigilator test (Maternity Cover)

**Department/Location:** University Library, Cambridge

**Reference:** VE02153

**Closing date:** 29 November 2013

Intereting and varied position

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

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

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



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

Media bookings			
MEDIA/PUBLICATION	DATE SENT	STATE	
University Job Opportunities		Not published	<input type="button" value="Publish"/> <input type="button" value="Preview"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/>
<input type="button" value="Add media"/>			

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


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


A separate document has also been created that gives an overview of what the applicant sees during the online application process. This document can also be found on the [HR Systems web pages](#).

## 4. Logging in and locating your vacancy/ applicant

### 4.1 Logging in to Web Recruitment

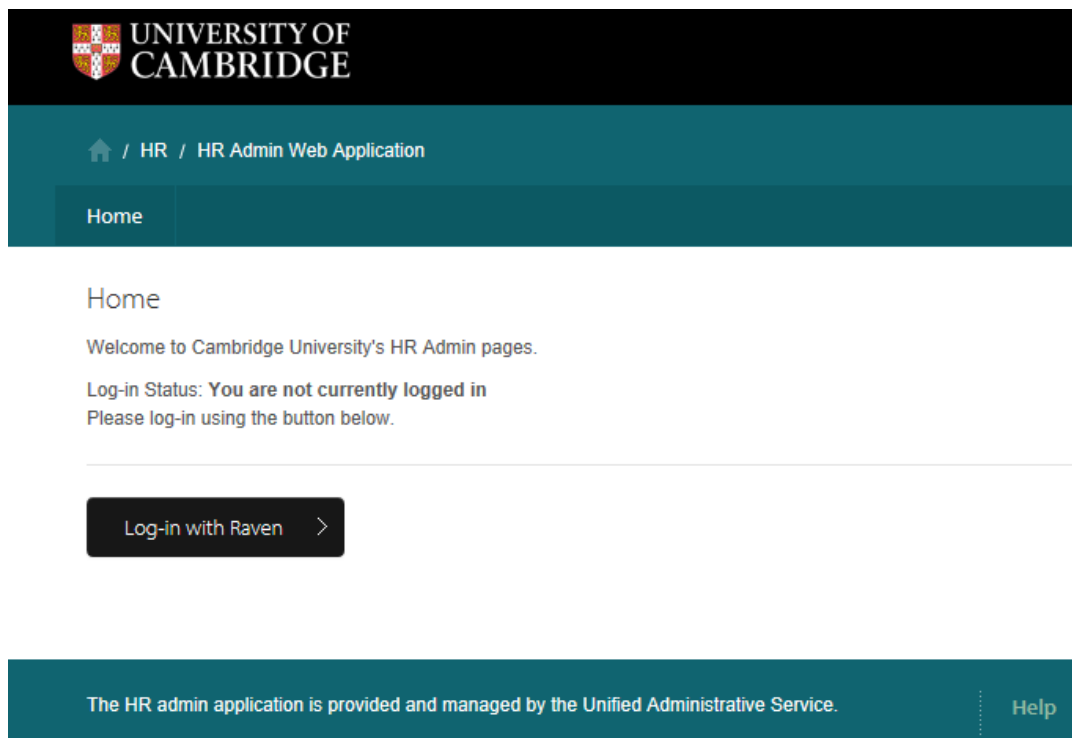
Use your Internet browser to go to <https://hrsystems.admin.cam.ac.uk/hr-admin-ui/>

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

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

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

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



The screenshot shows the home page of the University of Cambridge HR Admin Web Application. At the top, there is a black header with the University of Cambridge crest and name. Below this is a teal navigation bar with a home icon, 'HR', and 'HR Admin Web Application'. A 'Home' button is visible in the navigation bar. The main content area has a 'Home' heading, followed by a welcome message: 'Welcome to Cambridge University's HR Admin pages.' Below this, the log-in status is shown as 'Log-in Status: You are not currently logged in' with a note to 'Please log-in using the button below.' A prominent black button with white text 'Log-in with Raven' and a right-pointing arrow is centered on the page. At the bottom, a teal footer contains the text 'The HR admin application is provided and managed by the Unified Administrative Service.' and a 'Help' link.

2. Enter your Raven user-id and password.

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

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AH02327	Senior Clerk	Open	12-Apr-2014	0	Manage Vacancy	Contributer
AM02263	Research Assistant	Open	11-Apr-2014	30*	Manage Vacancy	Read Only Access
AW02219	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy	Administrator
AW02269	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy	Read Only Access
PH02258	University Lecturer	Open	12-Apr-2014	0	Manage Vacancy	Contributer

## 4.2 How to search for a vacancy in Web Recruitment

### 4.2.1 Search Option 1 – By status

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

Home / HR / HR Admin Web Application

Home Vacancies Admin Logout

Vacancies

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

Find Applicant

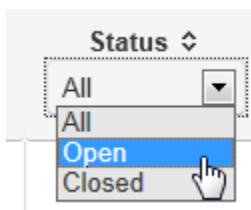
A star (\*) indicates an applicant has requested Reasonable Adjustments to the interview process

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AR02295	Research Fellow UAS - 23	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AR02304	Research Fellow UAS - 23	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AR02309	Research Fellow UAS - 23	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02218	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02230	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02246	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02267	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02282	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator

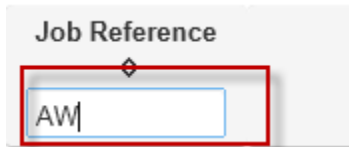
By default **All** vacancies are displayed.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions
AH02327	Senior Clerk	Open	12-Apr-2014	0	Manage Vacancy
AK02161	Research Assistant	Open	11-Apr-2014	30*	Manage Vacancy

You can display just Open or Closed Vacancies by selecting from the drop down box.



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 current search criteria.

Job Reference ↓	Job Title ↓	Status ↓	Closing Date ↓	Applicants
AW		All		
AW02219	Research Associate	Open	11-Apr-2014	30*
AW02231	UAS - 26	Open	12-Apr-2014	31*
AW02247	Assistant to Stu	Open	12-Apr-2014	30*
AW02269	Research Associate	Open	11-Apr-2014	30*
AW02283	UAS - 26	Open	12-Apr-2014	30*

#### 4.2.2 Search Option 2 – Using the filters

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

Home / HR / HR Admin Web Application

Home Vacancies Admin Logout

Vacancies

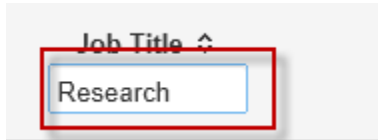
Below is a list of vacancies you have access to. Use the search boxes or page through to find a specific vacancy.

Find Applicant

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

Job Reference ↓	Job Title ↓	Status ↓	Closing Date ↓	Applicants	Actions	Access
AR02295	Research Fellow UAS - 23	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AR02304	Research Fellow UAS - 23	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AR02309	Research Fellow UAS - 23	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02218	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02230	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02246	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02267	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02282	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator

At the top of the **Job Title** column you will see a white search box. Enter data into this box 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 ⬇ Research	Status ⬇ All ▾	Closing Date ⬇	Applicants
AK02161	Research Assistant	Open	11-Apr-2014	30*
AM02263	Research Assistant	Open	11-Apr-2014	30*
AR02217	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02229	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02241	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02245	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02266	Research Fellow UAS - 23	Open	12-Apr-2014	0
AR02281	Research Fellow UAS - 23	Open	12-Apr-2014	0



### 4.3 How to search for an applicant in Web Recruitment

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

Home Vacancies Admin Logout

Vacancies

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

Find Applicant

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

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AR02295	Research Fellow UAS - 23	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AR02304	Research Fellow UAS - 23	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AR02309	Research Fellow UAS - 23	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02218	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02230	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02246	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02267	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator
AT02282	Research Assistant UAS - 25	Open	12-Apr-2014	0	Manage Vacancy	Administrator

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

UNIVERSITY OF CAMBRIDGE

Home Vacancies Admin Logout

Vacancies

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

Find Applicant

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

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

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

Find Applicants

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

Search results are limited to the first 50 applicants found

Forename:  Surname:

Date of Birth:  NI Number:

---

Vacancy Ref:  Vacancy Title:

[Search for Applicant](#)

- The results of your search will be displayed.

[Search for Applicant](#)

Applicant Name	Vacancy	Info
Brown, Donald	AW02269: Research Associate	<a href="#">i</a>
Brown, Louise	AW02269: Research Associate	<a href="#">i</a>

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

iate

**Full Name:** Brown, Amber

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

**Stage:** Application Received

**Status:** Active

## 5. Managing vacancies

### 5.1 Introduction

If you were listed in the new RAS system as the recruiter for the vacancy then, initially, you will be the only person with the ability to access that vacancy. You will have **Administrator** access, which means that you can view and process applications.

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

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

#### Vacancies

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

Show vacancies with recruitment complete

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

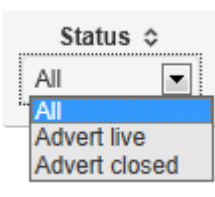
Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
02317	Unestablished Lecturer	Advert closed	26-Feb-2014	20*	Manage Vacancy	Administrator
02694	Fixed Term (3 Year) University Lectureship	Advert closed	14-Mar-2014	11*	Manage Vacancy	Administrator
02805	Research Associate in Theological Ethics	Advert closed	14-Apr-2014	1	Manage Vacancy	Administrator
02862	Research Associate	Advert closed	22-Apr-2014	0	Manage Vacancy	Administrator

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

Show vacancies with recruitment complete

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

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



To look at the history of filled vacancies (for example, to review the recruitment process the last time the job was advertised) then you can use the **Job Reference** and **Job Title** search boxes, or sort your vacancies based on **Closing Date**. Remember to tick the **Show vacancies with recruitment complete**

box, as required.



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

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

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

## 5.2 Giving others access to a vacancy

### 5.2.1 Introduction – Web Recruitment roles explained

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

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

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

Role	Available actions
READ:	Has the ability to: <ul style="list-style-type: none"> <li>• View applications and see what stage and status they are.</li> <li>• View documents uploaded to the vacancy and applicant records.</li> <li>• View all pending and completed correspondence.</li> <li>• View at vacancy level whether any of the applicants have requested reasonable adjustments (but not which applicant).</li> <li>• Create an applicant/ referee report.</li> <li>• Report on a vacancy.</li> <li>• Generate an HR11 selection grid.</li> </ul>
WRITE:	Same as above plus can: <ul style="list-style-type: none"> <li>• Change an applicant stage/status.</li> <li>• Add notes to an application via the notes window (pending).</li> <li>• Upload documentation to the vacancy and application.</li> <li>• Configure contact and reference details.</li> <li>• Customise rejections.</li> <li>• Re-activate rejected candidates.</li> <li>• Send rejection emails.</li> <li>• Can switch correspondence to manual and can download pdf rejection and reference documents.</li> <li>• Can request a reference.</li> <li>• Can manually upload a reference.</li> <li>• Record an applicant as requiring/not requiring a CoS.</li> <li>• Request an applicant to provide information for a CoS application.</li> <li>• View completed CoS information.</li> <li>• Record an offer made.</li> <li>• Record an offer outcome.</li> </ul>
ADMIN:	Same as above plus can: <ul style="list-style-type: none"> <li>• Add, edit and remove manual applicants.</li> <li>• Transfer preferred applicant(s) into CHRIS.</li> <li>• Give others access to the vacancy by assigning one of the three user roles to them.</li> <li>• See at applicant level which applicants have requested reasonable adjustments.</li> <li>• View reasonable adjustments requested, in the Notes field for an applicant.</li> <li>• Complete recruitment on a vacancy.</li> </ul>

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

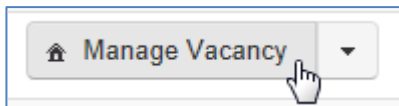
technical development and support.

Role	Available actions
SUPER-USER:	Has ADMIN level permission to all vacancies in the system, including the ability to change the retention policy for a vacancy.
SUPER-READ-ONLY:	Has READ level permission to all vacancies in the system.
REPORTER:	Used by reporting system. Will have an associated list of organisational units on which they can report using Discoverer.

### 5.2.2 Assigning Access Rights

To grant other access to a vacancy you are administering:

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



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

The screenshot displays the 'Vacancy Overview' page for '02317: Unestablished Lecturer'. On the left, a navigation menu lists various options, with 'Permissions' highlighted by a red rectangular box. The main content area includes a 'Welcome to the vacancy management area' message with a list of actions such as 'View and manage applications to this vacancy' and 'Manage vacancy permissions'. Below this is an 'Applicant & referee report' section with a button to download an Excel workbook. At the bottom, there is an 'Application Stages Overview' pie chart showing a total of 20 applications, with a legend for stages like 'Received', 'Short Listing', 'Selection One', 'Selection Two', 'Selection Three', 'Committee/Board', and 'Offer'.

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

### Vacancy Permissions

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

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

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

(1 of 1)    < << 1 >> >

+ Add new user
Save permissions

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

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

(1 of 1)    < << 1 >> >

+ Add new user
Save permissions

A new row will appear as shown below.

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

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


**Role**

READ	▼
READ	
WRITE	
ADMIN	


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


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

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

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



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

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




## 5.3 Storing recruitment documents and notes against a vacancy

### 5.3.1 Uploading and storing vacancy documents

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

- HR7 Further Information template (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr7/>);
- HR6 Selection Criteria template (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr6/>);
- HR11 Selection Results Grid (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr11/>);
- HR15 Selection Process Schedule (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr15/>).

 **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.

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

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

**Correspondence**

Awaiting Confirmation (2)

Completed and Others (4)

[View or Record Correspondence](#)

---

Permissions

---

Notes (0)

---

[Attachments \(0\)](#)

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

## AW02219: Research Associate

### Vacancy Attachments

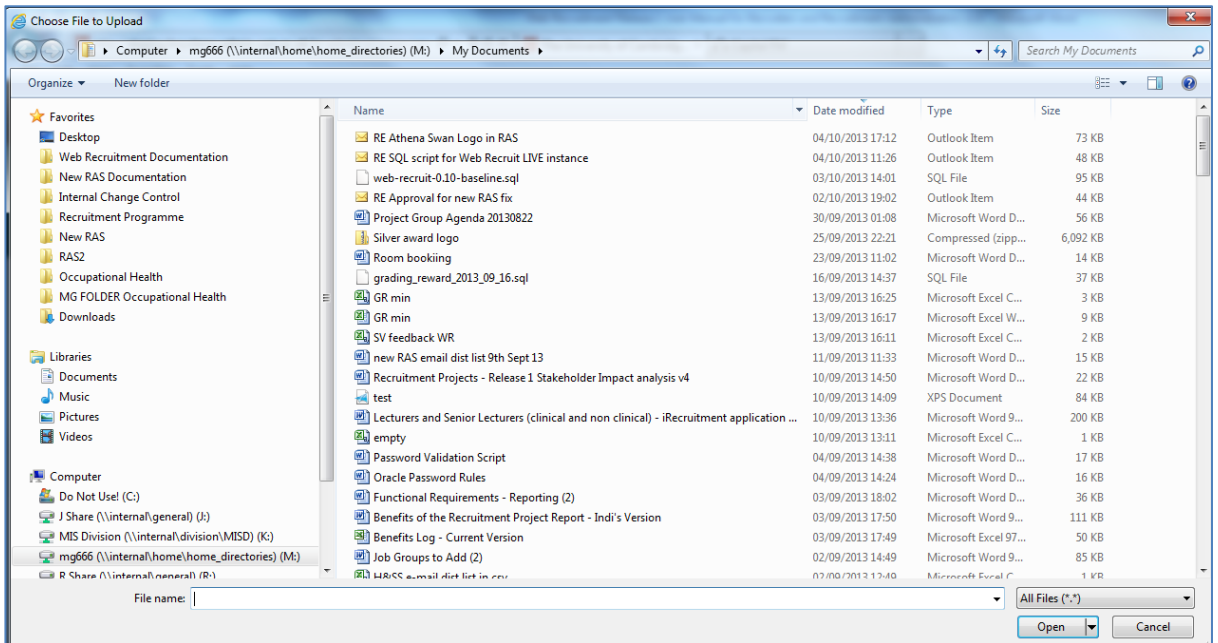
You can upload documents which relate to the vacancy as a whole, such as a selection results grid or Appointments Committee minutes. Select the documents and press the upload button. The following file types are supported: \*.pdf, \*.doc, \*.docx, \*.ppt, \*.pptx, \*.txt, \*.rtf.

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

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

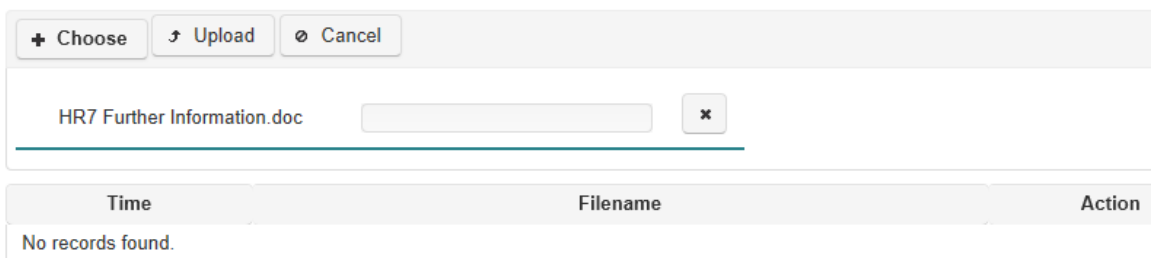
Time	Filename	Action
No records found.		

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

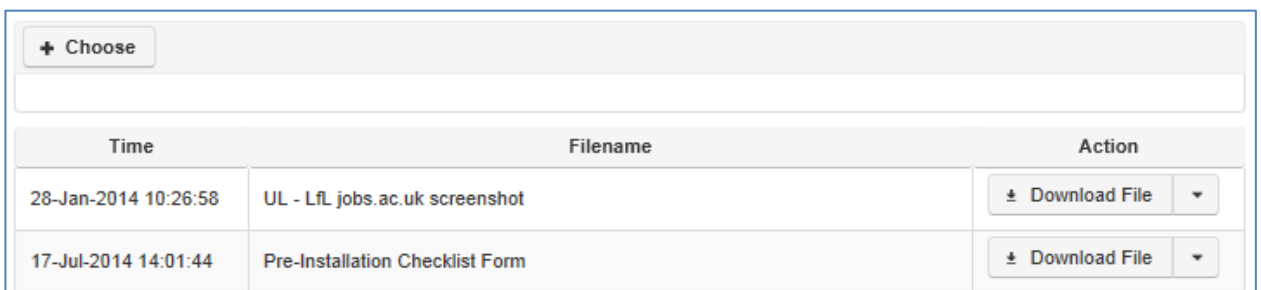


3. Select a file to be uploaded and click on **Open**.

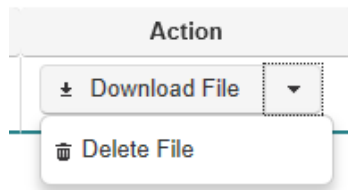
The file name will be displayed on screen.



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



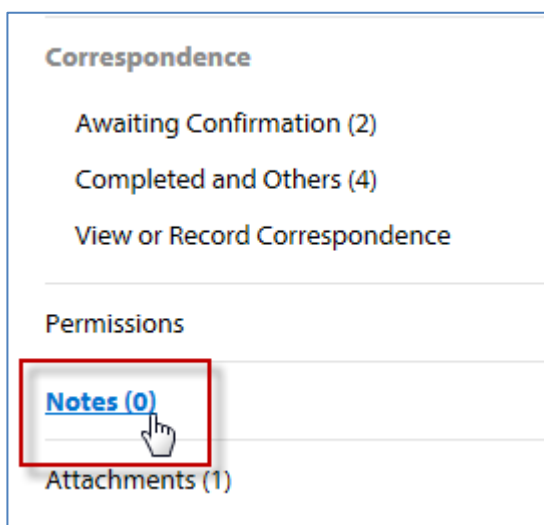
**Tip:** To check the file content, click the **Download File** button in the action field. To delete the document, select the **Delete File** option in the action field.



### 5.3.2 Recording vacancy notes

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

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



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

**Vacancy Notes**

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

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

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

New Note (930 characters remaining)

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

+ Add Note

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

**Vacancy Notes**

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

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

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

New Note (930 characters remaining)

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

+ Add Note

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

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

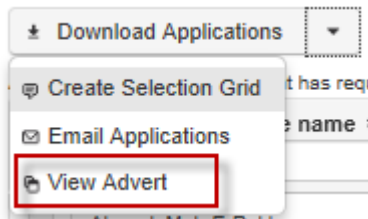
New Note (1000 characters remaining)

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

^ Add Note

## 5.4 Viewing the advert/further information for the vacancy

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



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

### AM02263 Research Assistant

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

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

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

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

The further information document is also shown underneath the advert.

## 6. Managing applicants through the selection process

### 6.1 Introduction

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

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

Vacancies

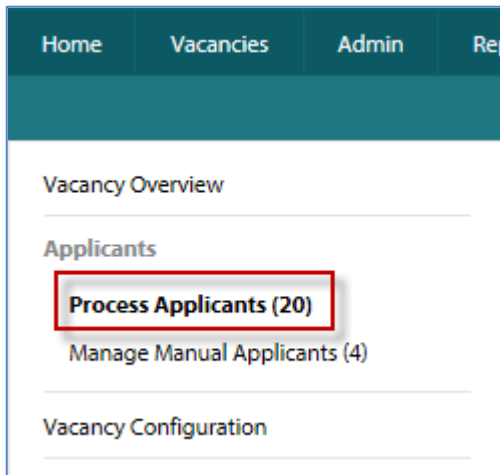
Below is a list of vacancies you have access to. Use the search boxes or page through to find a specific vacancy.

▼

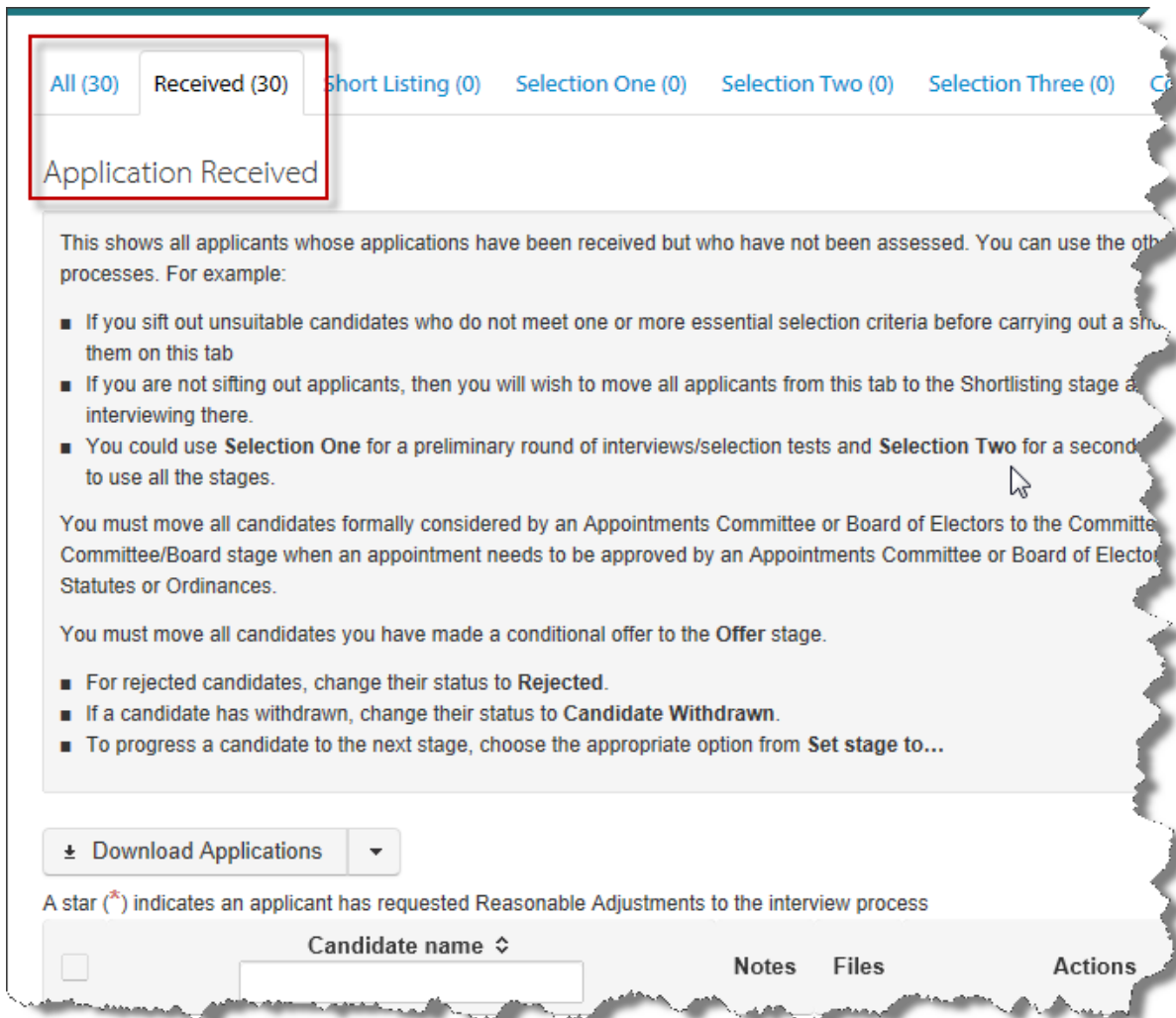
A star (\*) indicates an applicant has requested Reasonable Adjustments to the interview process

Job Reference ⌵	Job Title ⌵	Status ⌵ All ▼	Closing Date ⌵	Applicants	Actions
AH02327	Senior Clerk	Open	12-Apr-2014	0	Manage Vacancy ▼
AM02263	Research Assistant	Open	11-Apr-2014	30*	Manage Vacancy ▼
AW02219	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy ▼
AW02269	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy ▼
PH02258	University Lecturer	Open	12-Apr-2014	0	Manage Vacancy ▼

2. Select **Process Applicants**.



The Applicants screen will be displayed with the **Received** tab selected. This shows all applications that have been received but not yet assessed.



All (30) Received (30) Short Listing (0) Selection One (0) Selection Two (0) Selection Three (0) C...

### Application Received

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

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

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

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

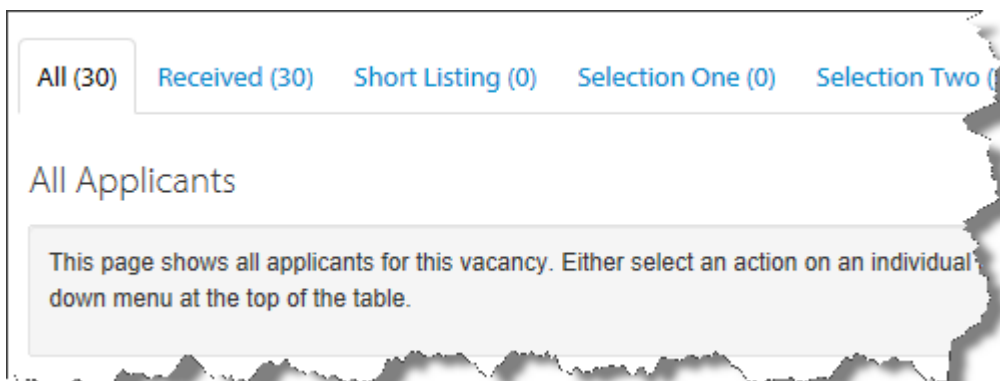
- For rejected candidates, change their status to **Rejected**.
- If a candidate has withdrawn, change their status to **Candidate Withdrawn**.
- To progress a candidate to the next stage, choose the appropriate option from **Set stage to...**

Download Applications

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

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

You can view any applications at other stages in the process by clicking on the relevant tab. The **All** tab shows all applicants for the vacancy, stating the stage they have reached (e.g. short-listing) and their status (e.g. rejected).



All (30) Received (30) Short Listing (0) Selection One (0) Selection Two (0) C...

### All Applicants

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



## 6.2 Adding, sharing and reviewing applications

### 6.2.1 How to view applications for a vacancy

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

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

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

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



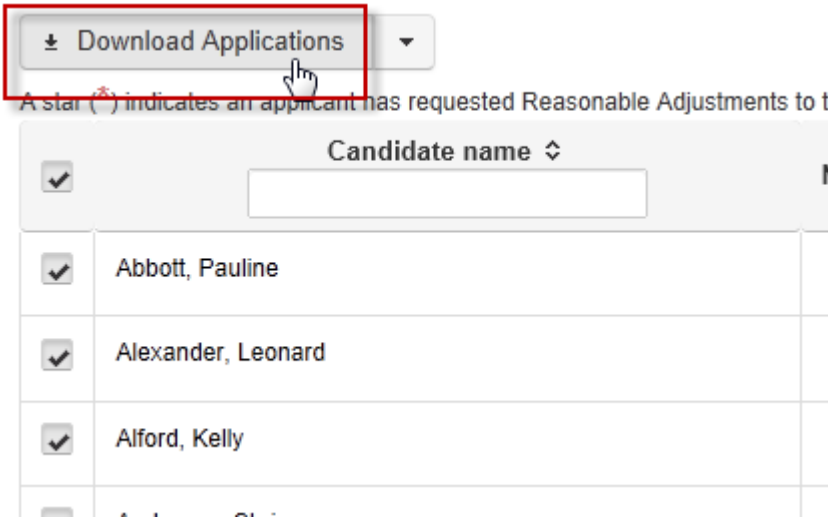
Note: If you are using Internet Explorer and experience any error messages when viewing a PDF, this is likely to be due to an issue with plug-ins on your PC. If this occurs, a workaround is to download the file and then open it from your file system. This will bypass the Adobe plug-ins for Internet Explorer.

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

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

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

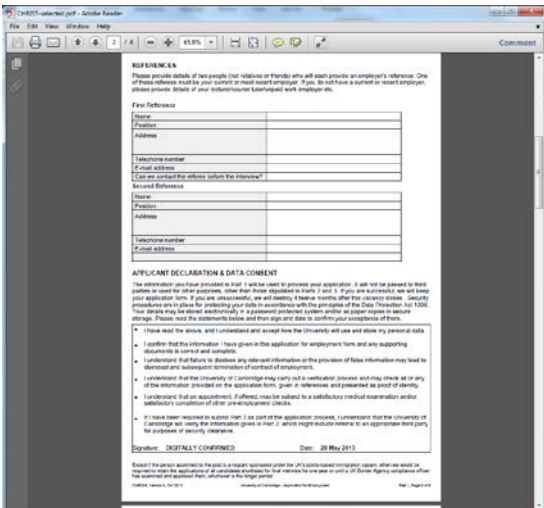
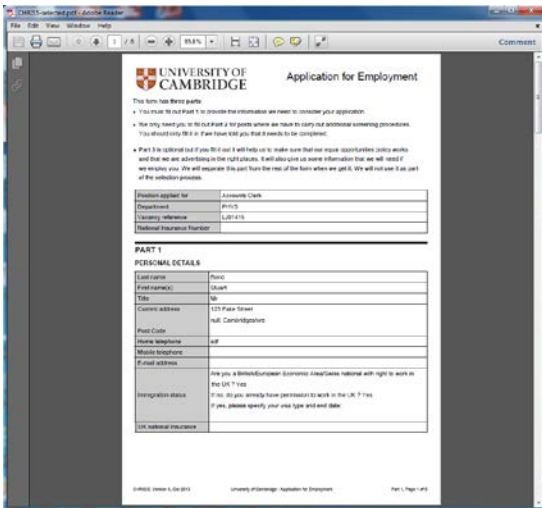
Web Recruitment System – Managing Vacancies and applicants



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

4. Select **Open**.

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



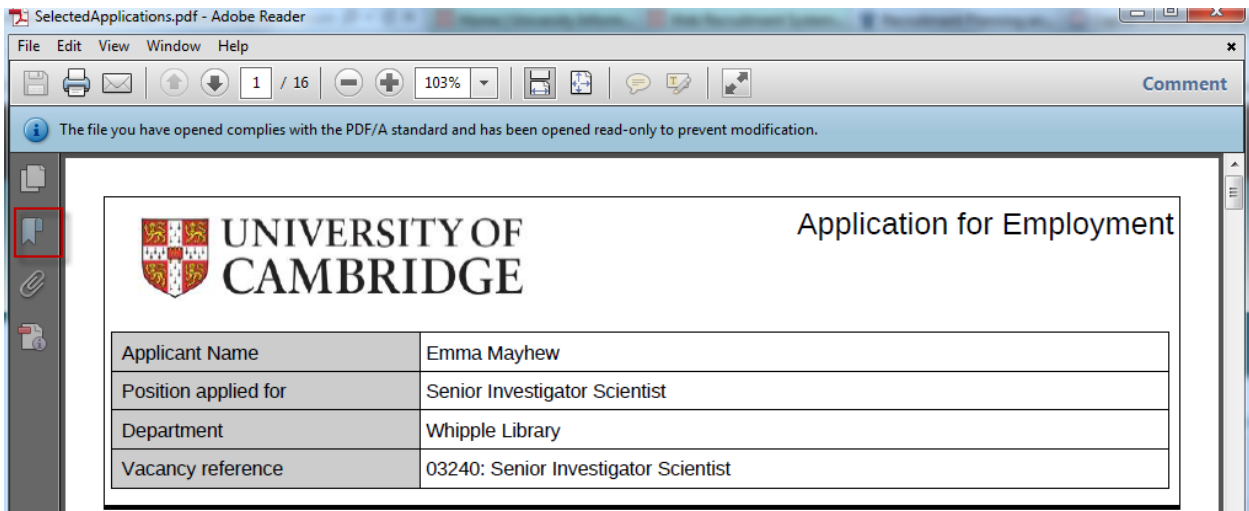
The PDF/A can be printed using **File/Print**.

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

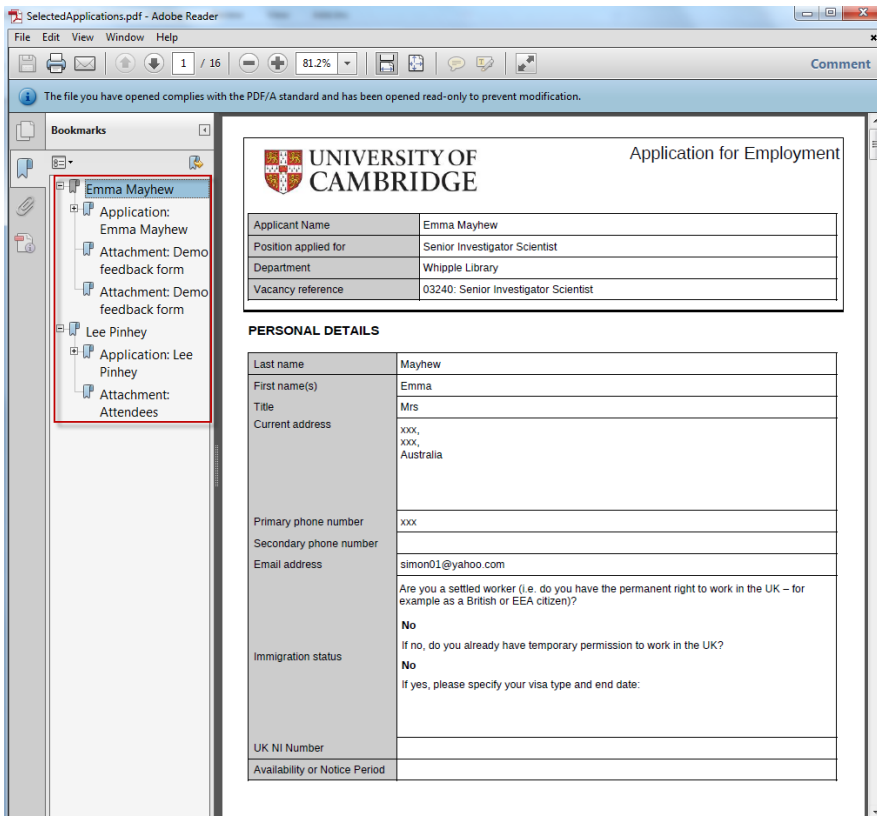
**Note:** If you are using Internet Explorer and experience any error messages when viewing a PDF this is likely to be due to an issue with plugins on your PC. If this occurs a

workaround is to download the file and then open it from your file system and this will bypass the Adobe plugins for Internet Explorer.

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



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



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

**Bookmarks**

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

UNIVERSITY OF CAMBRIDGE		Application for Employment
Applicant Name	Lee Pinhey	
Position applied for	Senior Investigator Scientist	
Department	Whipple Library	
Vacancy reference	03240: Senior Investigator Scientist	

**PERSONAL DETAILS**

Last name	Pinhey
First name(s)	Lee
Title	Mr
Current address	xx xx Barbados
Primary phone number	xx
Secondary phone number	
Email address	simon02@yahoo.com
Immigration status	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)? <b>No</b> If no, do you already have temporary permission to work in the UK? <b>No</b> If yes, please specify your visa type and end date:
UK NI Number	
Availability or Notice Period	

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

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

### 6.2.2 Viewing reasonable adjustment requests

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

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

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

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

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

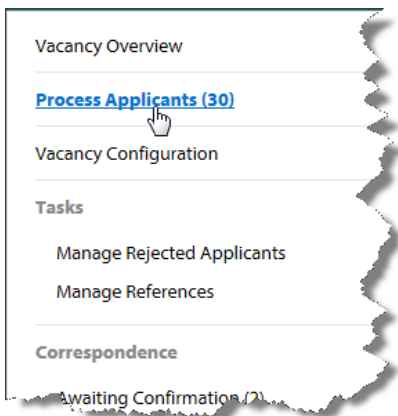
Only those with Admin access to a vacancy can view reasonable adjustment requests. Any recruiters who have only been granted Read or Write access to a vacancy are responsible for checking with a colleague with Admin access if there is anything that they need to be aware of in order to accommodate a reasonable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

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

	Candidate name	Submitted Date	Notes	Files	Actions	Status
<input type="checkbox"/>	brown, brown	20-Jan-2014 16:32:30	2	0	Download Application	Rejected
<input type="checkbox"/>	Paul, Andrews	13-Nov-2013 16:56:28	2*	0	Download Application	Active

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

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



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

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

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

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

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

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

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

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

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

### 6.2.3 Adding an applicant to a vacancy

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

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

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

Information on providing application forms in alternative formats is found at <http://www.admin.cam.ac.uk/cam-only/offices/hr/recruitment/planning/application.html#formats>

Once a non-online (manual) application has been submitted to you, basic details about the applicant can be entered onto the Web Recruitment System and attachments uploaded (such as a PDF scan of the application). This ensures that all of your applicant information is stored in one place, that personal details about the applicant can be transferred into the CHRIS Recruitment Module at a later date (if they are successful) and that the University has complete equal opportunities data.

To record an applicant who has not applied online:

- 1 Select the vacancy to which you would like to add an applicant. Click the drop down arrow on the **Manage Vacancy** button then click on **Add Applicant**.

Job Reference ⌵	Job Title ⌵	Status ⌵ All ▾	Closing Date ⌵	Applicants	Actions	Access
AH02327	Senior Clerk	Open	12-Apr-2014	0	🏠 Manage Vacancy ▾	Contributer
AM02263	Research Assistant	Open	11-Apr-2014	30*	🏠 Manage Vacancy ▾	Read Only Access
AW02219	Research Associate	Open	11-Apr-2014	30*	🏠 Manage Vacancy ▾ + Add Applicant	Administrator
AW02269	Research Associate	Open	11-Apr-2014	30*		Read Only Access

The following screen will be displayed:

UNIVERSITY OF CAMBRIDGE
Home / HR / HR Admin Web Application

Home
Vacancies
Logout

Manual Applicant Entry \*
Upload Documents

**Manual Application**

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

<p><b>Personal details</b></p> <p>Title: *  <input type="text" value="--- Please Select ---"/></p> <p>Family name: *  <input type="text"/></p> <p>Given names: *  <input type="text"/></p> <p>Email:  <input type="text"/></p> <p>Address Line 1: *  <input type="text"/></p> <p>Address Line 2:  <input type="text"/></p> <p>Address Line 3:  <input type="text"/></p>	<p><b>Vacancy Details</b></p> <p>Vacancy Reference:  <b>AW02219</b></p> <p>Vacancy Title:  <b>Research Associate</b></p> <p>Closing Date  <b>11-Apr-2014</b></p> <p>Applicant Status  <b>Application in progress</b></p>
<p>Town: *  <input type="text"/></p> <p>County:  <input type="text"/></p> <p>Postcode (or equivalent):  <input type="text"/></p> <p>Country: *  <input type="text" value="--- Please Select ---"/></p> <p><b>Equal Opportunities</b></p> <p>What is their date of birth? (If they prefer not to say, please leave blank)  <input type="text"/></p> <p>What is their gender? *  <input type="text" value="--- Please Select ---"/></p> <p>How do they describe their sexual orientation? *  <input type="text" value="--- Please Select ---"/></p> <p>How do they describe their gender identity? *  <input type="text" value="--- Please Select ---"/></p> <p>Do they regard themselves as having any Disabilities: *  <input type="text" value="--- Please Select ---"/></p>	<p><b>Other Details</b></p> <p>Is the applicant a British/European Economic Area/Swiss national with right to work in the UK?  <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>If not, do they already have permission to work in the UK?  <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Contact Phone Number: *  <input type="text"/></p> <p><b>Media</b></p> <p>Where did they first learn about this vacancy? *  <input type="text" value="--- Please Select ---"/></p> <p>Which country defines their national identity? *  <input type="text" value="--- Please Select ---"/></p> <p>Ethnic Origin: *  <input type="text" value="--- Please Select ---"/></p> <p>What are their religious beliefs? *  <input type="text" value="--- Please Select ---"/></p>

Cancel Save Save and Next >

This screen is based upon the details needed for successful applicants in the CHRIS Recruitment Module and has two tabs.



1. The first tab, **Manual Applicant Entry**, allows you to enter a minimum amount of essential information about the applicant. This includes details such as title, name, address, right to work status and equal opportunities information.
2. The screen shows the vacancy details on the right hand side.

Vacancy Details


Vacancy Reference:  
**AW02219**

Vacancy Title:  
**Research Associate**

Closing Date  
**11-Apr-2014**

Applicant Status  
**Application in progress**

Please check that you are editing the correct vacancy.

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

Do they regard themselves as having any Disabilities: \*

--- Please Select ---

---

3. Select the title for the applicant from the drop down list.

Personal details

Title: \*

--- Please Select ---

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

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

4. Enter the applicant's family name and forename. These fields are free format text fields.

Family name: \*

Given names: \*

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

Address Line 1: \*

Address Line 2:

Address Line 3:

Town: \*

County:

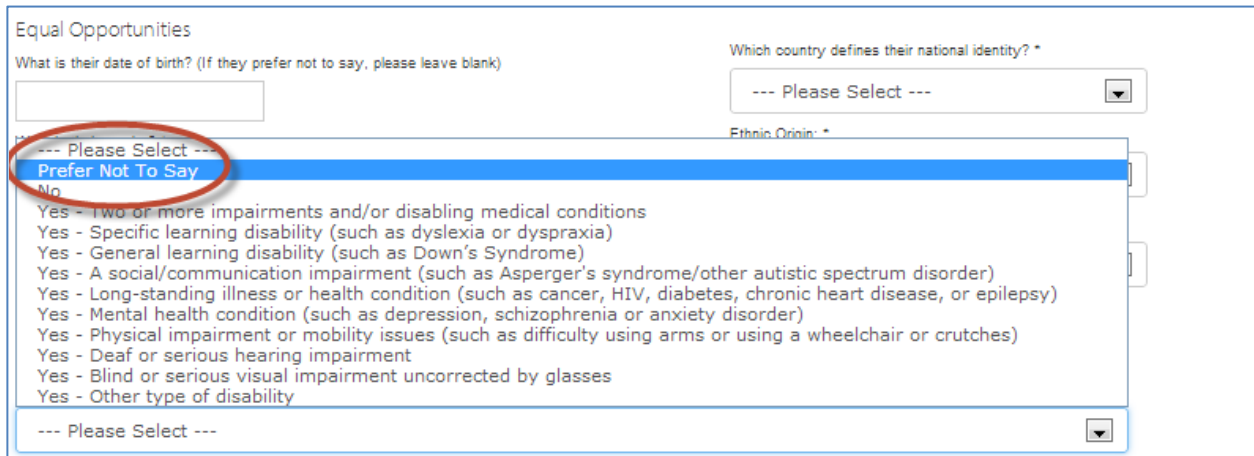
Postcode (or equivalent):

Country: \*

--- Please Select ---

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



Equal Opportunities

What is their date of birth? (If they prefer not to say, please leave blank)

Which country defines their national identity? \*

--- Please Select ---

Ethnic Origin: \*

--- Please Select ---

Prefer Not To Say

No

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

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

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

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

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

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

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

Yes - Deaf or serious hearing impairment

Yes - Blind or serious visual impairment uncorrected by glasses

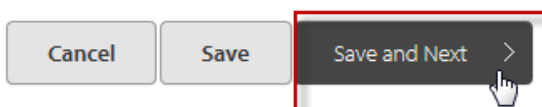
Yes - Other type of disability

--- Please Select ---



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.

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



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

Home	Vacancies	Logout
Manual Applicant Entry	<b>Upload Documents *</b>	

Supporting Document Upload

Use this form to upload the application documents, such as the applicant's CV, covering letter or application form so that they can be made available to the selection panels/appointing bodies. Please ensure you keep the application documents in their original format as well.

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

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

+ Choose    ↻ Upload    ✕ Cancel

Uploaded Time	Filename
No records found.	

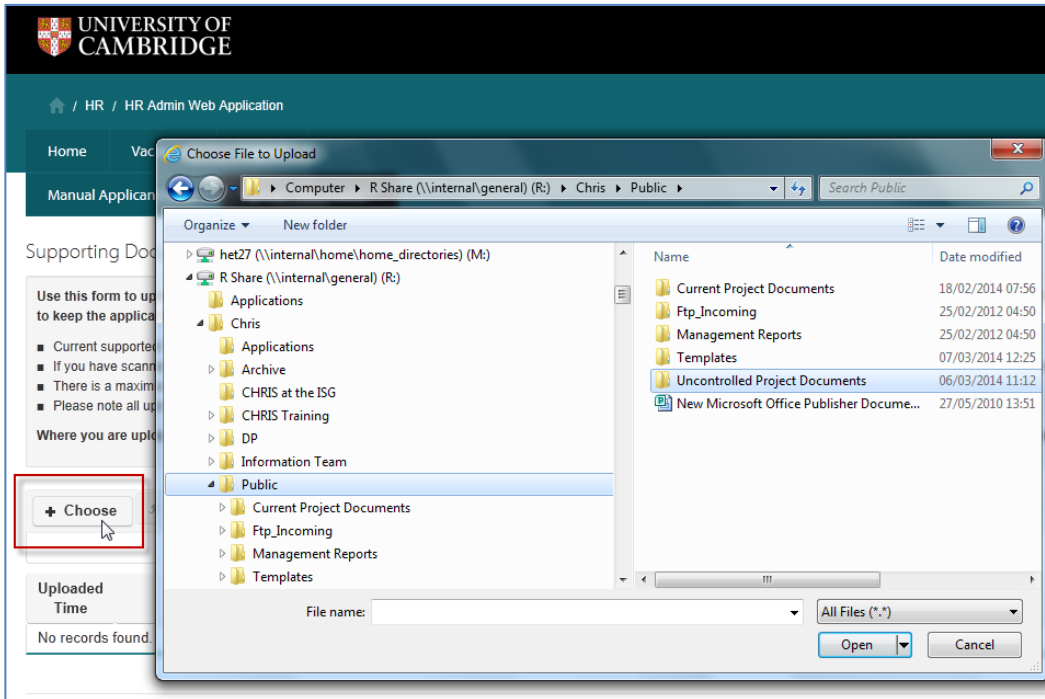
You can upload documents in any of the following file formats:

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

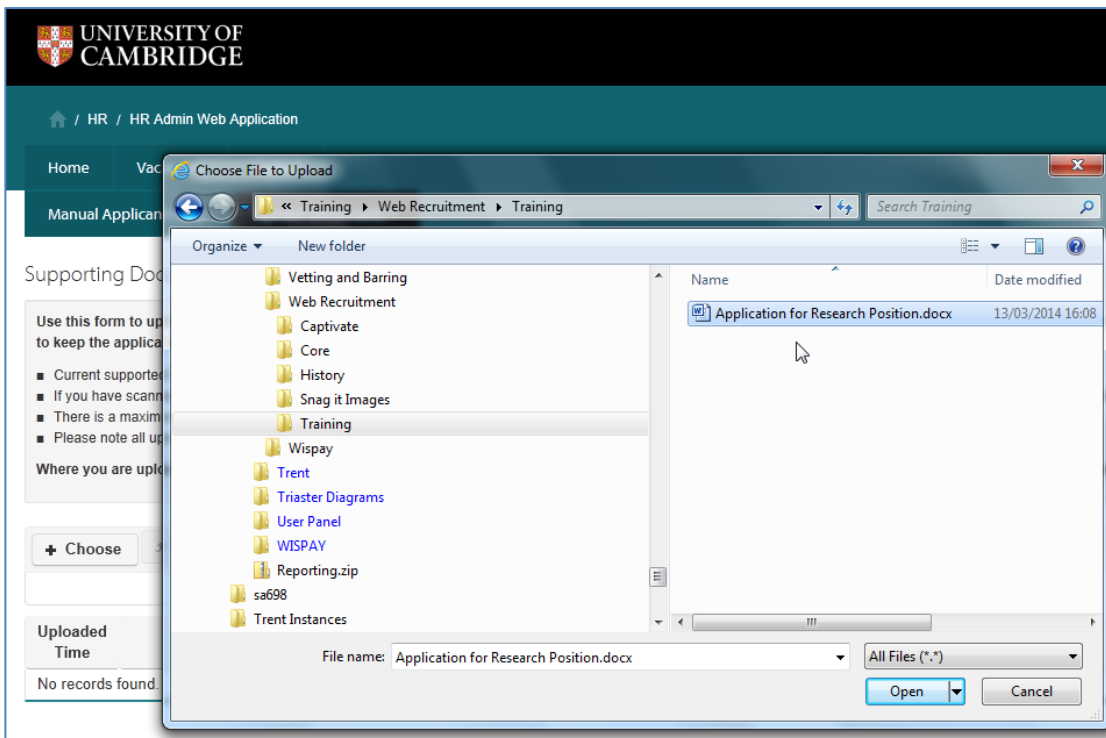


Note: It is highly recommended that PDFs are uploaded wherever possible. A maximum limit of 4MB is permitted per file with a limit of five files totalling no more than 20MB per application. Limits are set because there is a limit to the size of attachments that can be sent via email. Selection panels/appointing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

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



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



The filename should now appear in the file list:

### Document Upload

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

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

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

+ Choose


Uploaded Time	Filename	Action
17-Jul-2014 12:49:32	Pre-Installation Checklist Form	<span style="border: 1px solid #ccc; padding: 2px 5px;">Download File</span>

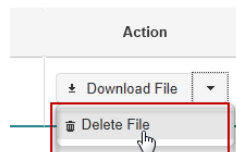
Cancel
Submit Application >

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

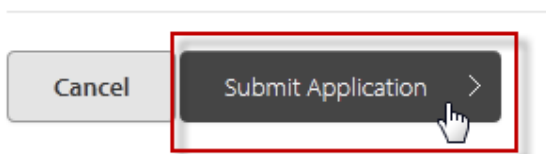
To view the uploaded document, click on the **Download File** button in the **Action** field.

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

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



**10.** 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** button is selected in the vacancy. The application will initially be given a status of received.

### 6.3 Sending out application packs and application-related information

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

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

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

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

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

### 6.3.1 Downloading an applicant pack

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

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

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

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



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

### 6.3.2 Emailing an applicant pack

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

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

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

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





Note: The generated pack will reflect the form 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).

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



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

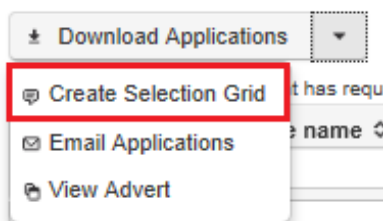


Note: Various email systems have different limits on email sizes. Where there are a greater number of applicants, or where applicants have submitted more attachments, you may need to send several emails to circulate the applications for a vacancy.

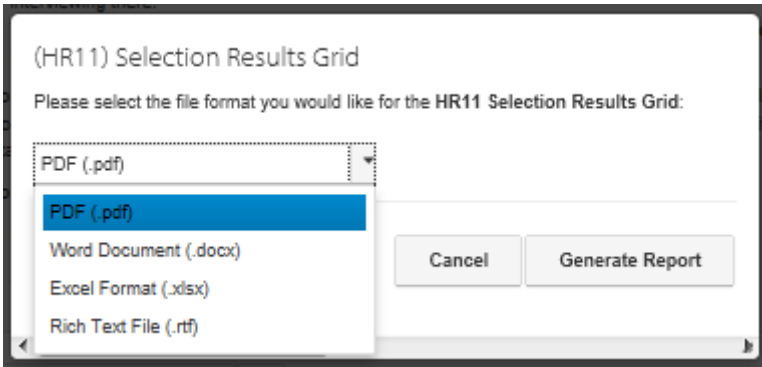
### 6.3.3 Creating a selection grid

A selection grid can be generated and downloaded from the system for selectors to record the results of a selection activity or stage in the process. The grid is a version of the [HR11 Selection Results Grid](#) which is pre-filled with the names of applicants who are at the selection stage you are currently in (i.e. the tab you are in when you create the grid).

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.

**UNIVERSITY OF CAMBRIDGE** **Selection Results Grid**

Vacancy Title	Category Manager	Vacancy Reference Number	AG03061
Department / Institution	Finance Division	Selection Stage	Received
Names of Assessors	Signature of Assessors		
Decision Rules			

Candidate	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			
Mrs Pauline Abbott													
Mr Leonard Alexander													
Mrs Kelly Alford													
Mr Chris Anderson													
Mr Jeremy Andrews													

Version: 3.1.0 Selection Results Grid Page 1 of 2

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

### 6.3.4 Generating applicant and referee reports

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

## 6.4 Updating applicant records and their progress

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

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

The following sections describe these processes.

### 6.4.1 Updating selection stages and statuses

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

A number of stages have been defined and these are:

- Application Received (Received);
- Progressed to Short-listing (Short-listing);
- First Selection Stage (Selection One);
- Second Selection Stage (Selection Two);
- Third Selection Stage (Selection Three);
- To be considered by Appointments Committee/Board of Electors (Committee/Board); and
- Offer in progress (Offer).

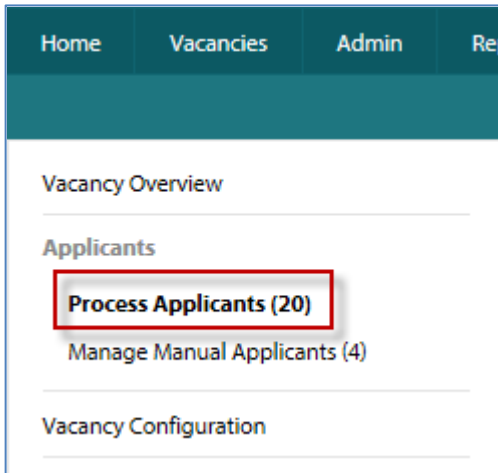
The brackets in the list above indicate the abbreviated name of each stage as it shows on the tabs across the top of the screen. For clarity, a full version of each stage name is used in the drop-down list where you change the status/stages of applicants.

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

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

AW02219	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy
---------	--------------------	------	-------------	-----	----------------

2. Select **Process Applicants**.



A list of applicants will be displayed.

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

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

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

## AW02219: Research Associate

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

Application Received

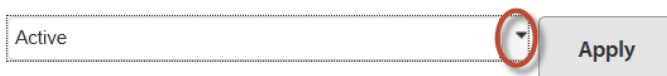
- Click on the tab that reflects the selection stage you wish to view or process. This will display the current applicants at that stage of the process.

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

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

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

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



You will see in the list that you can either:

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

**Set Status To**  
Active  
Rejected  
Candidate Withdrawn

**Set Stage To**  
Application Received  
Application progressed to short-listing  
First Selection Stage  
Second Selection Stage  
Third Selection Stage  
To be considered by Appointments Committee/Board of Electors  
Offer in Progress

Active

Apply

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

Rejected

Apply

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

### Confirm Action ✕

**4 Applicant(s) Selected:**  
Are you sure you want to change the **Status** of the following applicants to REJECTED ?

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

Yes      No

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

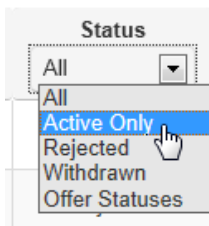
A star (\*) indicates an applicant has requested Reasonable Adjustments to the interview process

Updates Successful  
Candidates records updated

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

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

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



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



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

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.

### 6.4.2 Editing the details of an existing applicant

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

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

<input type="checkbox"/>	Candidate name ⇅	Notes	Files	Actions	Status
<input type="checkbox"/>	Abbott, Pauline	2*	0	Download Application Email Application Add/View Notes Admin Attachments Edit Applicant Download Application	Active at Received
<input type="checkbox"/>	Alexander, Leonard	2*	0		Active at Received
<input type="checkbox"/>	Alford, Kelly	2*	0		Active at Received
<input type="checkbox"/>	Anderson, Chris	2*	0		Active at Received

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

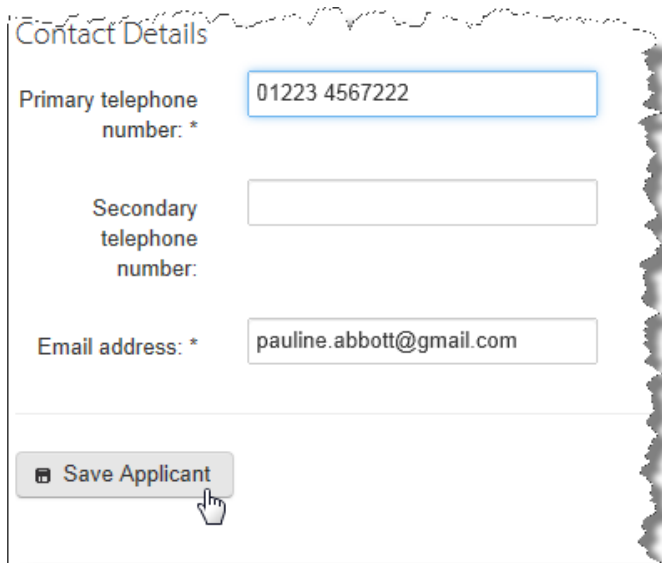
**Edit Applicant Personal Details**

<b>Personal Details</b>		<b>Address Details</b>	
Title: *	Mrs	Address Line 1: *	72 Jeavons Lane
Given Name(s): *	Pauline	Address Line 2:	Jeavons Lane
Family Name: *	Abbott	Address Line 3:	Great Cambourne
<b>Contact Details</b>		Town: *	Cambridge
Primary telephone number: *	01223 456789	County:	Cams
Secondary telephone number:		Postcode (or equivalent):	CB23 9AG
Email address: *	pauline.abbott@gmail.com	Country: *	United Kingdom

close

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.

### 6.4.3 Adding attachments to an existing applicant


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

- HR8 Response to Enquiry (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr8/>);
- HR10 Assessment Record (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr10/>);
- HR13 Invite to Interview Letter (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr13/>);
- HR17 Assessor Notes template (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr17/>);
- HR4 Starting Salary Case (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/pd04/>);
- HR18 Conditional Offer letter (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr18/>);
- HR23 Welcome Letter (<http://www.admin.cam.ac.uk/cam-only/offices/hr/forms/hr23/>).

 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.

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

<input type="checkbox"/>	Candidate name 	Notes	Files	Actions
<input type="checkbox"/>	Abbott, Pauline	2*	0	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Download Application</span> </div>
<input type="checkbox"/>	Alexander, Leonard	2*	0	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Email Application</span> </div>
<input type="checkbox"/>	Alford, Kelly	2*	0	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Add/View Notes</span> </div>
<input type="checkbox"/>	Anderson, Chris	2*	0	<div style="border: 1px solid #ccc; padding: 2px;"> <span><b>Admin Attachments</b></span> </div>

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

Applicant admin attachments

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

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

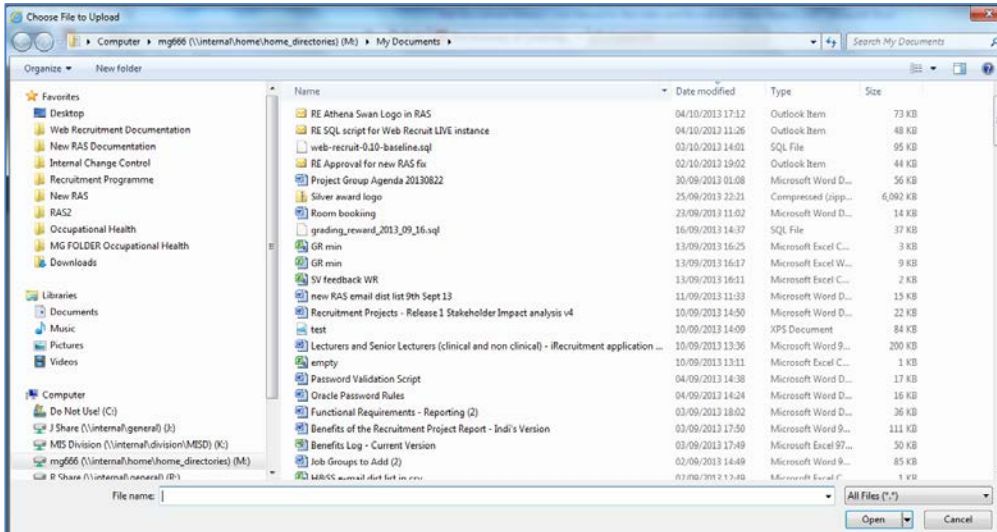
If you have read-only access to this vacancy then you will be able to view attachments but not upload or delete them.

+ Choose Upload Cancel

Time	Filename	Action
No records found.		

File Attachment Window close

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



- Select a file to be uploaded from your file directory. Double-click on it or click on **Open**.
- You will be returned to the pop-up window. You will see the name of the file you have selected. Click on the **Upload** button as shown below, to upload the file (you can click on the **Cancel** button if you have chosen the wrong file).

### Applicant admin attachments

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

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

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

+ Choose
↗ Upload
⊗ Cancel

HR10 Assessment Record.doc
✕

Time	Filename	Action
No records found.		

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

### Applicant admin attachments

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

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

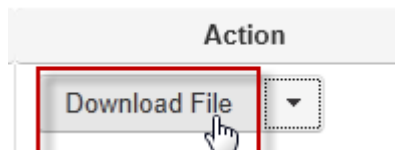
If you have read-only access to this vacancy then you will be able to view attachments but not upload or delete them.

---

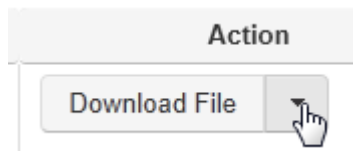
+ Choose
↗ Upload
⊘ Cancel

Time	Filename	Action
2014-03-13T18:37:54.642	HR10 Assessment Record	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> <span style="border: 1px solid #ccc; padding: 2px 5px;">🗑</span>  <span style="border: 1px solid #ccc; padding: 2px 10px;">^ Download File</span> </div>

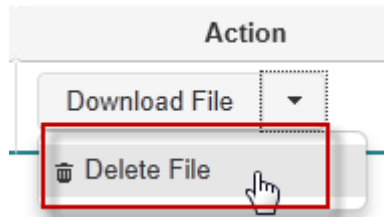
**Tip:** To check the file content, click on the **Download File** button in the action field next to the relevant document in the table of attachments.



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



Select **Delete File**.



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

#### 6.4.4 Adding notes to an applicant’s record

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

You may record information such as:

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

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

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

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

<input type="checkbox"/>	Alexander, Leonard	2*	0	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Download Application</span> </div>
<input type="checkbox"/>	Alford, Kelly	2*	0	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Email Application</span> </div>
<input type="checkbox"/>	Anderson, Chris	2*	0	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Add/View Notes</span> </div>
<input type="checkbox"/>	Andrews, Jeremy	2*	0	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Admin Attachments</span> </div>
<input type="checkbox"/>				<div style="border: 1px solid #ccc; padding: 2px;"> <span>Edit Applicant</span> </div>

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

### Application notes

These notes provide a history of the application - they are an auditable trail and can be used to note changes to the applicants details, interview notes or other relevant information.

Please describe the source of the comments (eg phone conversation with applicant, notes from interview panel etc)

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

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

New Note (740 characters remaining)

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

^ Add Note

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

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

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

## 6.5 Sending rejection correspondence and reference requests

Please see the Web Recruitment manual 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 manual on generating correspondence on the [HR systems web pages](#) for details of how to generate and send reference requests using the system.

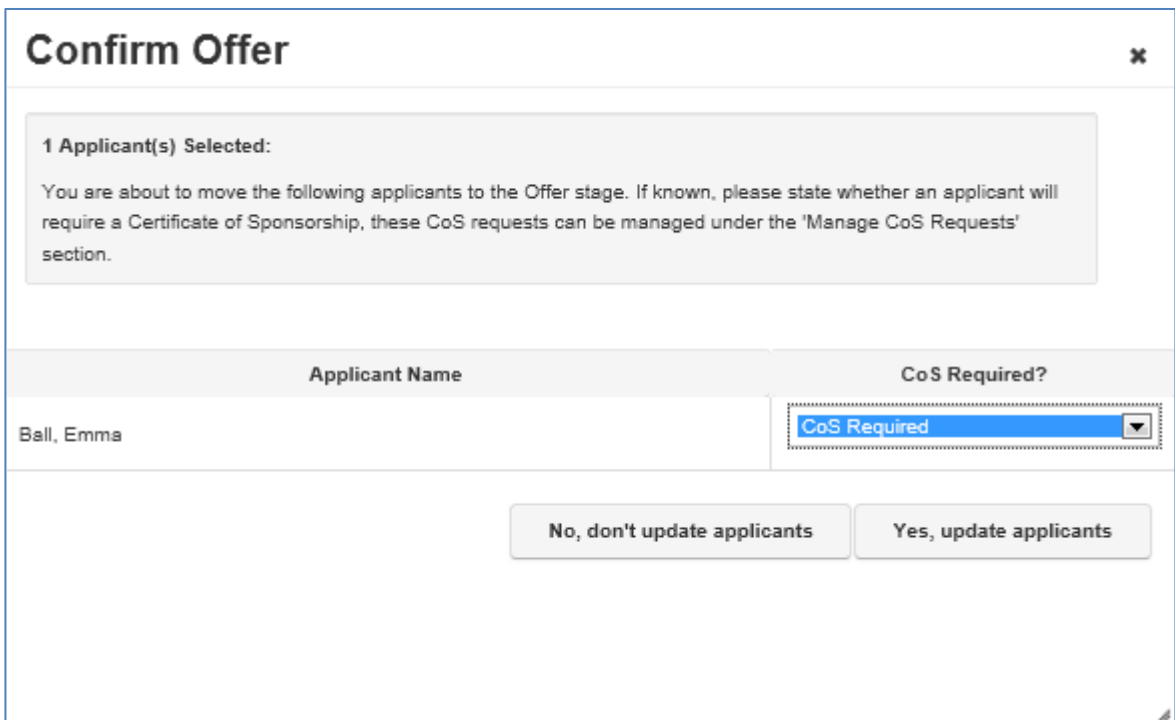
## 6.6 The Offer Stage

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



The screenshot shows a table with one row containing a checked checkbox, the name 'Davies, Fraser', and the number '2\*'. Below the table is a pagination bar showing '(2 of 2)' and navigation buttons. Below the pagination bar is a dropdown menu set to 'Offer in Progress' and an 'Apply' button with a mouse cursor pointing to it.

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

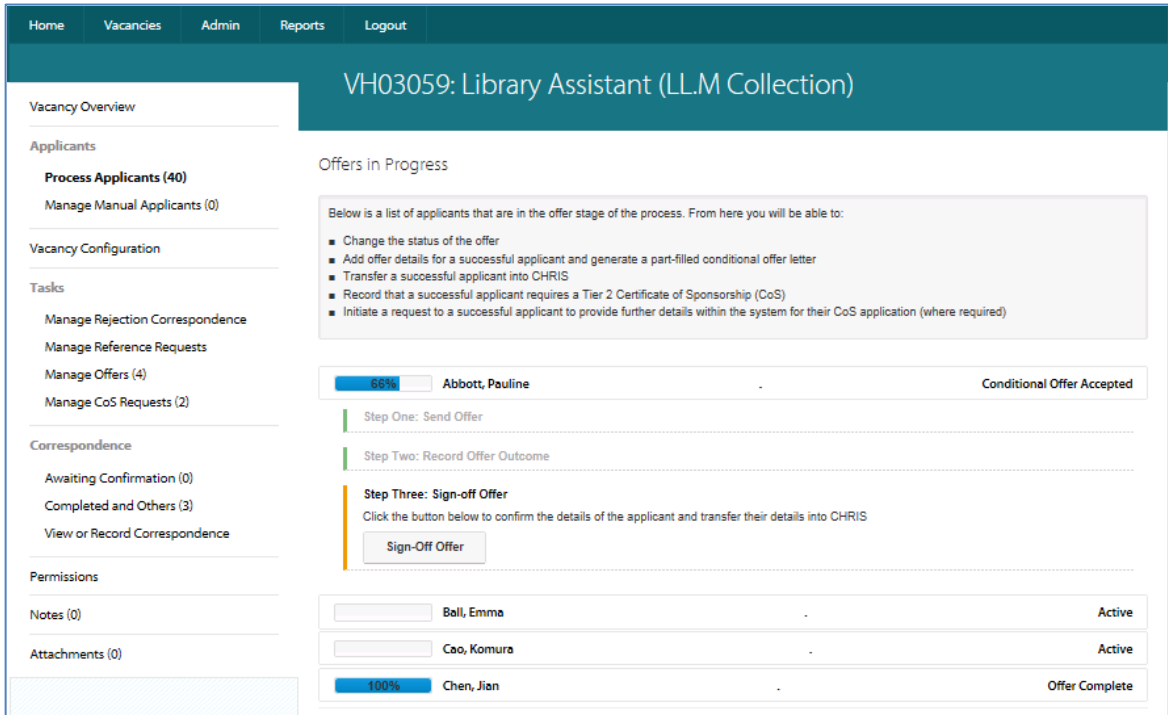


The 'Confirm Offer' dialog box has a title bar with a close button. The main content area contains the following text: '1 Applicant(s) Selected: You are about to move the following applicants to the Offer stage. If known, please state whether an applicant will require a Certificate of Sponsorship, these CoS requests can be managed under the 'Manage CoS Requests' section.' Below this text is a table with two columns: 'Applicant Name' and 'CoS Required?'. The table has one row with 'Ball, Emma' in the first column and a dropdown menu set to 'CoS Required' in the second column. At the bottom of the dialog box are two buttons: 'No, don't update applicants' and 'Yes, update applicants'.

The confirmation window will indicate whether a 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.

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

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



The screenshot shows the 'Manage Offers' interface for vacancy VH03059: Library Assistant (LL.M Collection). The left sidebar contains navigation links for 'Vacancy Overview', 'Applicants', 'Vacancy Configuration', 'Tasks', 'Correspondence', 'Permissions', 'Notes', and 'Attachments'. The main content area is titled 'Offers in Progress' and includes a list of actions: 'Change the status of the offer', 'Add offer details for a successful applicant and generate a part-filled conditional offer letter', 'Transfer a successful applicant into CHRIS', 'Record that a successful applicant requires a Tier 2 Certificate of Sponsorship (CoS)', and 'Initiate a request to a successful applicant to provide further details within the system for their CoS application (where required)'. Below this, three applicant cards are shown: Pauline Abbott (66% progress, Conditional Offer Accepted) with a 'Sign-Off Offer' button; Emma Boll (Active); and Komura Cao (Active). Jian Chen (100% progress, Offer Complete) is also listed.

Please see the section on [Managing Offers and Transferring Successful Applicants to CHRIS](#) for details about how to record the progress of offers (e.g. whether the offer has been accepted) and transfer successful candidates to the CHRIS Recruitment Module.

As well as appearing in the **Manage Offers** screen, the applicant moved to **Offer in progress** will also appear in the Offer tab within the **Process Applicants** screen.



VH03059: Library Assistant (LLM Collection)

Process Applicants (40)

Offer (2)

Below is a read-only list of all applicants within the offer stage. These applicants should now be managed using the 'Manage Offers' area of the system.

If any applicants are in this list erroneously, they can be moved back to a previous state using the 'Change Stage' feature of the action list.

Manage These Offers    Manage These Offers (Super-User View)

Candidate name	Submitted	Notes	Files	Actions	Status
Ball, Emma	09-Apr-2014 13:38:17	2	0	Download	Active
Chen, Jian	29-Mar-2014 14:30:20	1	0	Download	Offer Complete

Here, you can still view all applicants at the Offer stage and:

- Download or email an application,
- Change the stage for an applicant if they have been moved to offer in error,
- Add or view notes or attachments, and
- Edit the application.



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



Note: If the requirement for a CoS is recorded for an applicant, a CoS task is created under the **Manage CoS requests** menu item.

Manage CoS Requests (1)

CoS Status Information:

- Not Requested: Request for CoS application details not yet sent
- Data Requested: Request for CoS application details sent, awaiting information from the applicant
- Data Received: Applicant has completed required CoS information

Initiate CoS Request

Name	Date Requested	Date Received	CoS Status	Action
Ball, Emma			Not Requested	Request Details

Please see the manual entitled '[Requesting a Certificate of Sponsorship \(CoS\)](#)' for further details of how to then request a CoS.

If an applicant has been moved to offer incorrectly then select **Change stage** from the action list and you will see the following pop up window:

**Change Applicant Stage**

Please select the stage to which this applicant should be moved. The applicant status will be changed to Active.

Application Received

Cancel    Change Applicant Stage

Select the stage from the drop down list:

Application Received

- Application Received
- Application progressed to short-listing
- First Selection Stage
- Second Selection Stage
- Third Selection Stage
- To be considered by Appointments Committee/Board of Electors

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

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

## 7. Managing Offers and Transferring Successful Applicants to CHRIS

Write or Admin users should record the progress of an offer within the Manage Offers screen. See the section on [managing applicants](#) for details of how to transfer the preferred candidate(s) to this stage.

There are three steps within the offer process:

- i. **Send Offer** – this is confirming that you have made an offer to the successful applicant outside of the system (i.e. by sending an [HR18 Conditional Offer Letter](#), confirming the details of any verbal offer already made);
- ii. **Record Offer Outcome** – this is confirming whether an applicant has accepted or rejected the offer of employment, or if you have withdrawn the offer.
- iii. **Transfer to CHRIS** – Admin users should transfer the details of the successful applicant into the CHRIS Recruitment Module once an offer has been accepted. This will enable the relevant CHRIS user to record the details of the offer (e.g. salary) in the CHRIS Recruitment Module without having to create an applicant record manually.

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

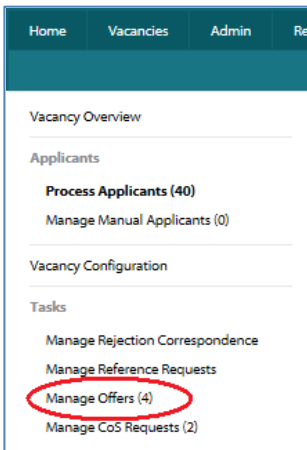


Note: In this release you are simply recording the outcome of the offer. Future releases of Web Recruitment will offer more support for the offers process so that for example, the

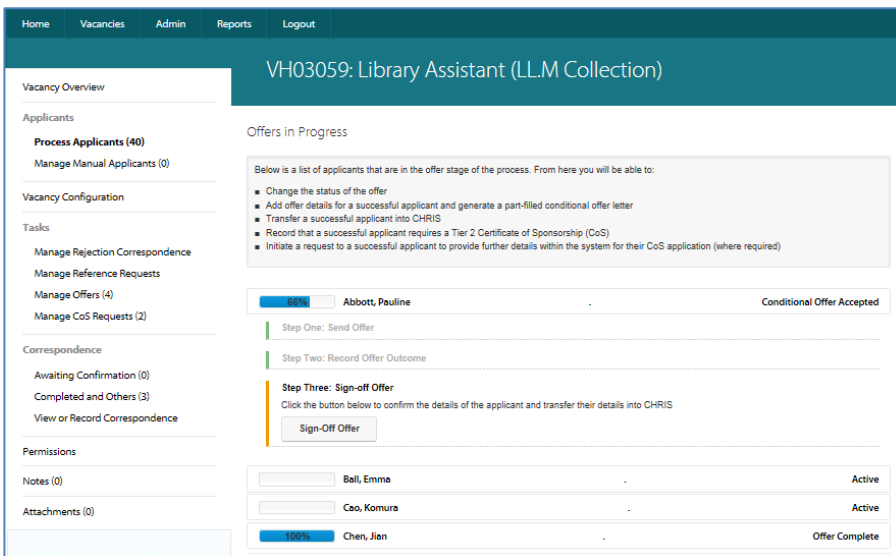
offer details can be entered into Web Recruitment and a letter generated and sent. The current process explained above is the first step in developing this expanded functionality.

To record offer details the system will guide you through the key steps:

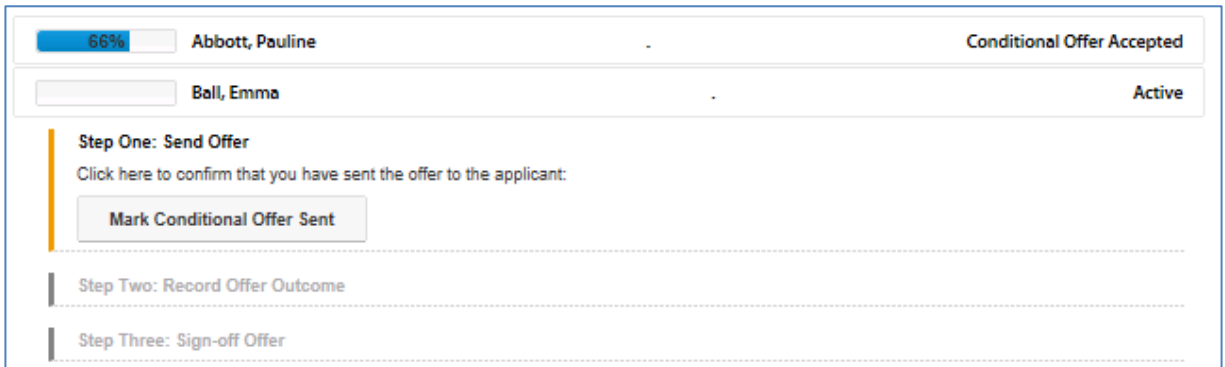
1. Select the **Manage Offers** from the menu.



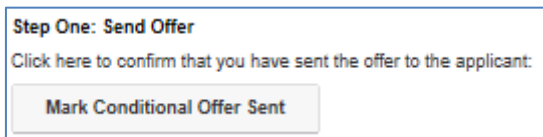
2. The preferred candidate (s) will then be displayed in the Manage offers screen.



Note: The first applicant's details will automatically be expanded upon entry to the screen. If you have more than one applicant in the **Manage Offers** screen (i.e. because you have advertised multiple vacancies in one advert), click on another applicant's name to expand their details.

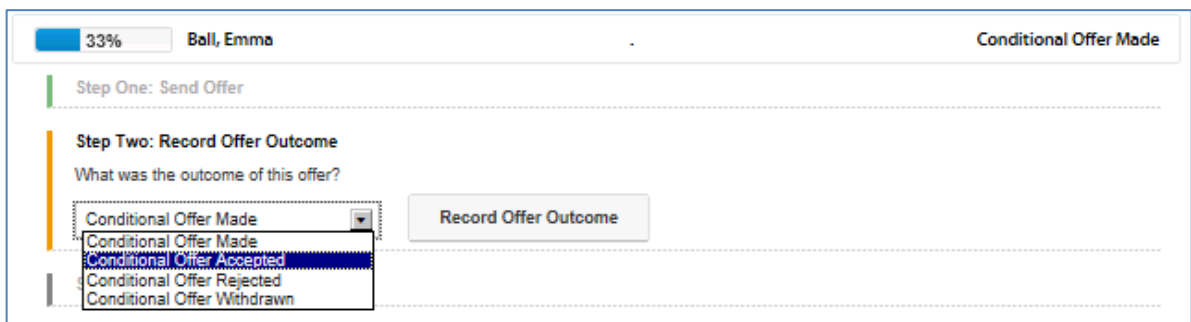


3. **Step One** – confirm that the offer has been sent to the applicant by clicking on the **Mark Conditional Offer Sent** button. This will change the offer status within the system for this applicant.



Once you have done this, the next step will become available.

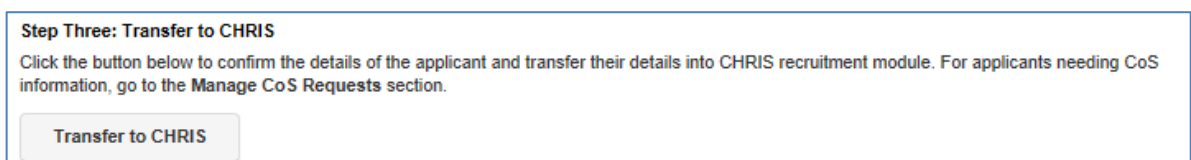
4. **Step Two** – once the outcome of the offer is known, select the appropriate option from the drop down list.



Click on the **Record Offer Outcome** button.

If the offer outcome is **Conditional Offer Accepted** then Step 3 will become available.

5. **Step Three** – once the conditional offer has been accepted, the Admin user for the vacancy should transfer the applicant’s details into the CHRIS Recruitment Module.



Click on the **Transfer to CHRIS** button and the following screen will be displayed so that

you can review the details before the transfer.

6. Check the applicant’s details and make any corrections (e.g. if they have informed you that they have moved house).

## 03240: Senior Investigator Scientist

### Transfer Applicant to CHRIS

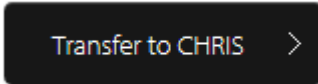
Please review the information below. When you are satisfied that the information is correct press the Transfer to CHRIS button


After the applicant has been transferred into CHRIS, you need to log in to the CHRIS recruitment module and record the details of the offer. You will then need to send a CHRIS/10A form and relevant supporting documentation to the New Appointments team.

<h4 style="color: #008080; margin: 0;">Personal Details</h4> <p>Title: *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>Dr</span> <span>▼</span> </div> <p>Surname / family name: *</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Walter</div> <p>Forename 1: *</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Wilson</div> <p>Forename 2:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; height: 20px;"></div> <p>Forename 3:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; height: 20px;"></div> <p>Date of Birth:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">30-Apr-2014</div>	<h4 style="color: #008080; margin: 0;">Address Details</h4> <p>Address Line 1: *</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">132 Test Street</div> <p>Address Line 2:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; height: 20px;"></div> <p>Address Line 3:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; height: 20px;"></div> <p>Town: *</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Cambridge</div> <p>County:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Cambridgeshire</div> <p>Postcode:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">CB1 NR3</div> <p>Country: *</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>Algeria</span> <span>▼</span> </div> <p>Contact Number: *</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">234124</div>
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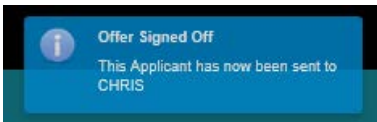
7. Click **Save** to save the changes if you are part-way through making amendments and want to return to complete them later.

8. Once you are satisfied that the applicants details are up-to-date, click on the **Transfer to CHRIS** button.




 Note: Full details of the validation of this screen can be found in the section on [Adding an applicant to a vacancy](#).

9. If the transfer process is successful a message will be displayed giving the status:



The applicant's status will also be updated to Offer Complete:

Step Three: Transfer to CHRIS		
100%	<a href="#">Mayhew, Emma</a>	Offer Complete
100%	<a href="#">Pinhey, Lee</a>	Offer Complete
66%	<a href="#">Robinson, Lucy</a>	Conditional Offer Accepted

 Note: Where a transfer has been successful, this means that an applicant record has been created automatically in the CHRIS Recruitment Module. This was a step previously undertaken manually by administrators in departments/institutions.

10. Finally, the vacancy administrator will need to record the details of the offer (e.g. starting salary) made to the preferred candidate in the offer screen **within the CHRIS Recruitment Module**. Please see the [Leavers and Recruitment Manual](#) for instructions on how to complete this part of the process.

**The CHRIS/10A will also still need to be sent to the New Appointment team** during this release of Web Recruitment. In future, this part of the process will be reviewed again with the aim of simplifying it further in subsequent releases of the Web Recruitment System.

## 8. Completing recruitment for a vacancy

A vacancy should be marked as recruitment complete when:

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

Marking a vacancy as complete will perform a number of actions within the system to benefit administrators. 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);
- Be detached from the position in CHRIS so that it can be advertised again when necessary in new RAS;
- 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).



**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.

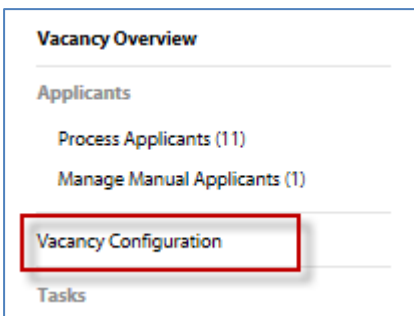
- 1) In order to complete recruitment on a vacancy, select the vacancy and click on **Manage vacancy**.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
VC03115	Business Specialist (Moodle)	Closed	09-May-2014	0	Manage Vacancy	Administrator
VC03135	Application Specialist [Technical Specialist 2] Moodle	Closed	09-May-2014	0	Manage Vacancy	Administrator
VD03222	Research Fellow	Open	28-Feb-2015	0	Manage Vacancy	Administrator
VD03273	Research Fellow	Open	28-Feb-2015	0	Manage Vacancy	Administrator
VE02991	Bonita Trust Genizah Research Associate	Closed	18-Apr-2014	0	Manage Vacancy	Administrator
VE03099	Deputy Head of Music Collections	Closed	25-Apr-2014	0	Manage Vacancy	Administrator
VF03229	University Constable	Open	28-Feb-2015	0	Manage Vacancy	Administrator
VF03280	University Constable	Open	28-Feb-2015	0	Manage Vacancy	Administrator
VH03059	Library Assistant (LLM Collection)	Closed	16-Apr-2014	40*	Manage Vacancy	Administrator
VH03171	Clinical Lecturer	Open	28-Feb-2015	0	Manage Vacancy	Administrator

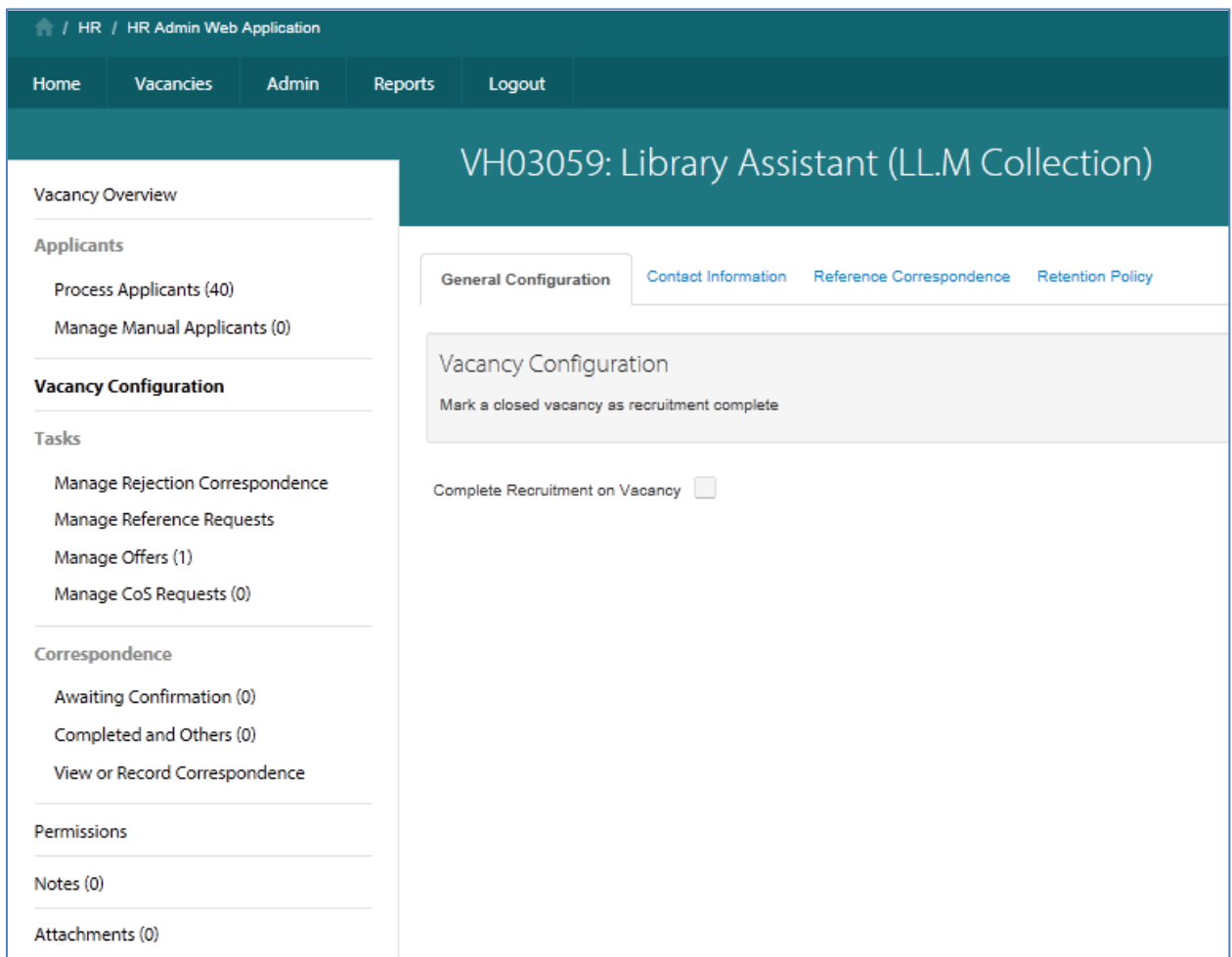


Note: Recruitment can only be completed for a vacancy when the vacancy closing date has passed.

- 2) Select ‘**Vacancy Configuration**’ from the left hand menu



The following screen will then be displayed:



- 3) On the **General Configuration** tab click in the box next to **Complete Recruitment on Vacancy**.



Complete Recruitment on Vacancy

The following message will be displayed:

### Vacancy Configuration

Mark a closed vacancy as recruitment complete

## Confirm Complete Recruitment

Are you sure you want to complete recruitment on this vacancy [VH03059 - Library Assistant (LL.M Collection)] ?

**Note:** This action is not reversible

No, don't complete recruitment
Yes, complete recruitment

Click on ‘Yes, complete recruitment’.



Note: You can also mark a vacancy with Recruitment completed from the main vacancy list:

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
02805	Research Associate in Theological Ethics	Closed	14-Apr-2014	3	Manage Vacancy	Administrator
02862	Research Associate	Closed	22-Apr-2014	1	Complete Recruitment	Administrator
AG03061	Category Manager	Closed	22-Apr-2014	40*	Manage Vacancy	Administrator
AG03141	Category Manager [Leave Cover]	Closed	22-Apr-2014	0	Manage Vacancy	Administrator
AK02928	International Student Administrator	Closed	22-Apr-2014	40*	Manage Vacancy	Administrator
AK03309	Esquire Bedell	Closed	26-May-2014	0	Manage Vacancy	Administrator
AR02985	Festival and Outreach Assistant	Closed	16-Apr-2014	40*	Manage Vacancy	Administrator
EA03095	Assistant Gardener	Closed	22-Apr-2014	40*	Manage Vacancy	Administrator
EW03060	Research Facilitator	Closed	13-Apr-2014	0	Manage Vacancy	Administrator
GE02803	Graduate Library Trainee	Closed	14-Apr-2014	40*	Manage Vacancy	Administrator

(1 of 15) 1 2 3 4 5 6 7 8 9 10 10

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## 9. 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.

## 10. Exceptions to the 'Standard' Process

### 10.1 Studentships

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

### 10.2 Applicants sourced through agencies

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

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