System User Guide

Line Manager/School/Department Administrator (SDA) - Guide to the Hiring App

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Contents

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Introduction

This guide covers an overview for Line Managers and School Department Administrators acting as Hiring Managers or Recruiters during the recruitment process. This guide provides detailed guidance relating to the Hiring App. It is related to the Guide to Recruitment and Onboarding which is linked below.

Guide to Recruitment and Onboarding

This guide is linked to the Guide to Creating and Maintaining a Job Requisition.

In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips are provided within the 'In Detail' section.

Navigating the Hiring App – Requisitions

1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.
2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. You can also navigate to Offers from here.
3. The search function and filters at the top of the screen allow you to quickly find a job requisition. You can also create a job requisition from here (see How to Create and Manage a Job Requisition guide for details). To view **inactive** requisitions, click on filters to expand the list and scroll to the bottom of the list of filters and select the toggle button.
4. There are a number of columns of information you can view. You can customise and reorder these by clicking on the customise columns icon and then selecting the columns you would like to view.
5. **Actions** appear at the end of all the columns as a static field. Click on the ellipsis (3 dots) to take action on the Job Requisition, the actions displayed **will vary depending** on the phase and state of the requisition.
6. Click on the name of the Job Requisition to view the details
7. The **Requisition Details** screen will then be displayed navigate between the sections

Manage Job Applications

1. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. The easiest way to view applications is by clicking on the number from the Applications Column.
2. The list of candidates for that requisition will be displayed. By default, this will show active applications by application status. This screen provides a high-level overview of the candidate records and links to the CV.
3. Using the keywords, filters or sort by at the top of the screen you can refine the list of candidates you wish to review.
4. The Actions and More Actions at the top of the candidate list are available as bulk actions and

depend on the phase and state of the candidate, select the candidates you want to take action for. The actions using the ellipsis (3 dots) are candidate specific and depend on the phase and state.

How to Review Applications and Take Action

1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then Hiring.
2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. The easiest way to view applications is by clicking on the number from the Applications Column.
3. From the Job Applications Screen click on the candidate's name to view the candidate profile and application in full.
4. There are different sections you can review. Use the left and right arrows at the top of the screen to move to the next candidate in the requisition list or click the back arrow on the left to return to the full list of candidates.
5. On the left hand of the screen, you will see some key contact information for the candidate and a progress bar, which shows the phases completed and current phase, click on the link to see further details in the Progress tab. You can also see if the candidate is a current employee or an external applicant.
6. Click on the ellipsis (3 dots) to take action, for example, to add the candidate as favourite, move the application (to update the phase and state) or create a job offer. The actions depend on the candidate's phase and state.

Bulk Actions including Bulk Print

Bulk Move

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. Select the candidates you wish to move and click Move Application at the top of the list, update the Phase and State and add a comment if required, then click **Move.**
3. The candidates Application status will then be updated.

Bulk Print (Save Application as a PDF)

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. Select the candidates you wish to bulk download and click on **More Actions**, then select **Save Application as PDF.**
3. Deselect any details you do not wish to include, then click **save**. You will then see an ‘Action will be processed’ pop up box at the bottom of the screen.

Once the bulk print job has completed you get a notification via the Bell Icon and an Email with the zip file containing all the applications you selected.

Adding Documents to a Candidates Record

There are instances where documents may be added to a candidate's record. For example, when references are sought for the interview process or interview documents are to be added for the panel. To add any documents to the candidate’s record, follow the below steps.

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. From the Job Applications Screen, click on the candidate's name to view the candidate profile, then navigate to the Activity Tab, documents.
3. In the Internal Attachments section, click on the pencil icon and upload the document(s). Any documents added here are visible by the hiring team only.

Collecting Feedback after Interview

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. Select the candidate you wish to gather feedback and on the candidate details screen select the ellipsis at the top left of the candidate details, then select Collect Feedback.
3. Click continue on the Candidates section.
4. Select the respondents from the list or add a name manually, then click continue.
5. Select the Interview Questionnaire from the drop down, then click continue.
6. Ignore Include Documents – this is not required, unless you wish to attach any of the documents listed with the request, then click to continue.
7. Request Details – amend the expiration date and time as required and add a note for respondents. You do not need to tick 'Request a Rating from respondent'.
8. Then click Submit at the top of the screen.
9. When the respondents have completed the interview feedback questionnaire, you will receive an email and notification on the Bell icon. This can also be viewed in the Feedback tab of the candidate's record.

How to Reject Candidate(s)

Please note this is a **two step process**. You should send an email using the templates provided to the unsuccessful candidate(s) **before** updating the phase and state.

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. Select the candidate(s) you wish to send a message to and click More Actions and select Send Message.
3. A send message box will appear on the right of the screen. In the Template field choose from the appropriate template
4. Return to the Requisition candidate list to update the Phase (e.g. Screening) and State to **Rejected by Employer**. Select the candidates, then click on more actions, update the phase and state and add a comment if required, then click **Move.**
5. The candidates Application status will then be updated and will be viewable by the candidate.

Navigating the Hiring App – Offers

The offers section shows all Job Offers by state (drafted, accepted, withdrawn etc). Please read the separate guide 'How to create and Manage a Job Offer' for full details on how to draft, extend, and manage job offers.

1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client

Groups (if accessing as an SDA), then Hiring.

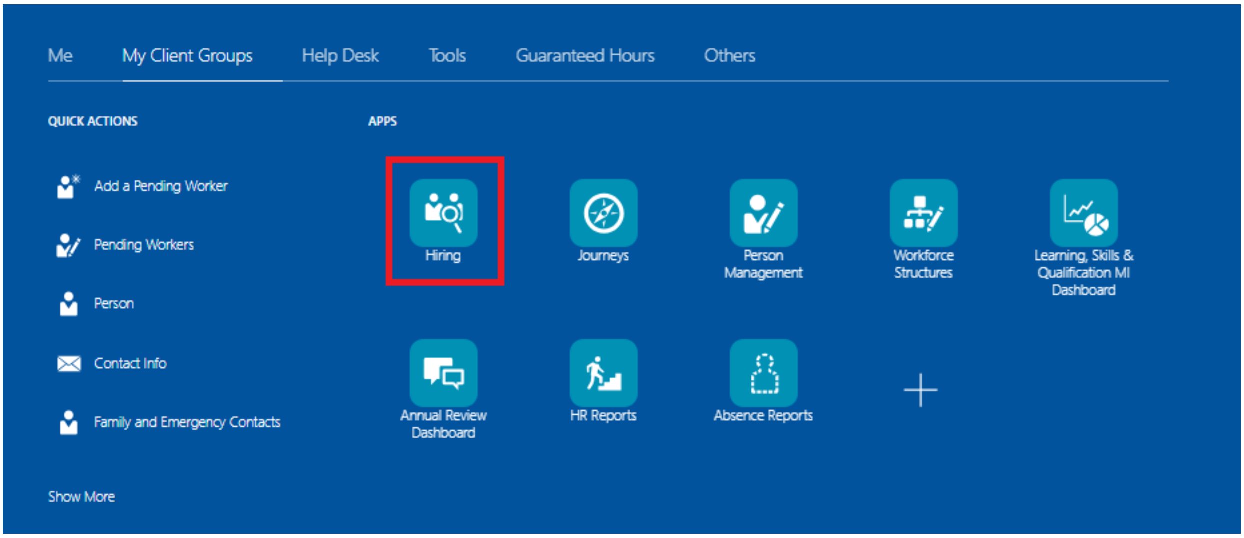
2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. From here, navigate to Offers at the bottom of the page.
3. The search function and filters at the top of the screen can be used to create a preferred default view.
4. There are a number of columns of information you can view by using the scroll bar underneath the offer list, you can customise these by clicking on the customise columns icon and then selecting the columns you would like to view
5. **Actions** appear at the end of all the columns as a static field. Click on the ellipsis (3 dots) to take action on the Offers, the action you can take will vary depending on the state of the offer.

In Detail

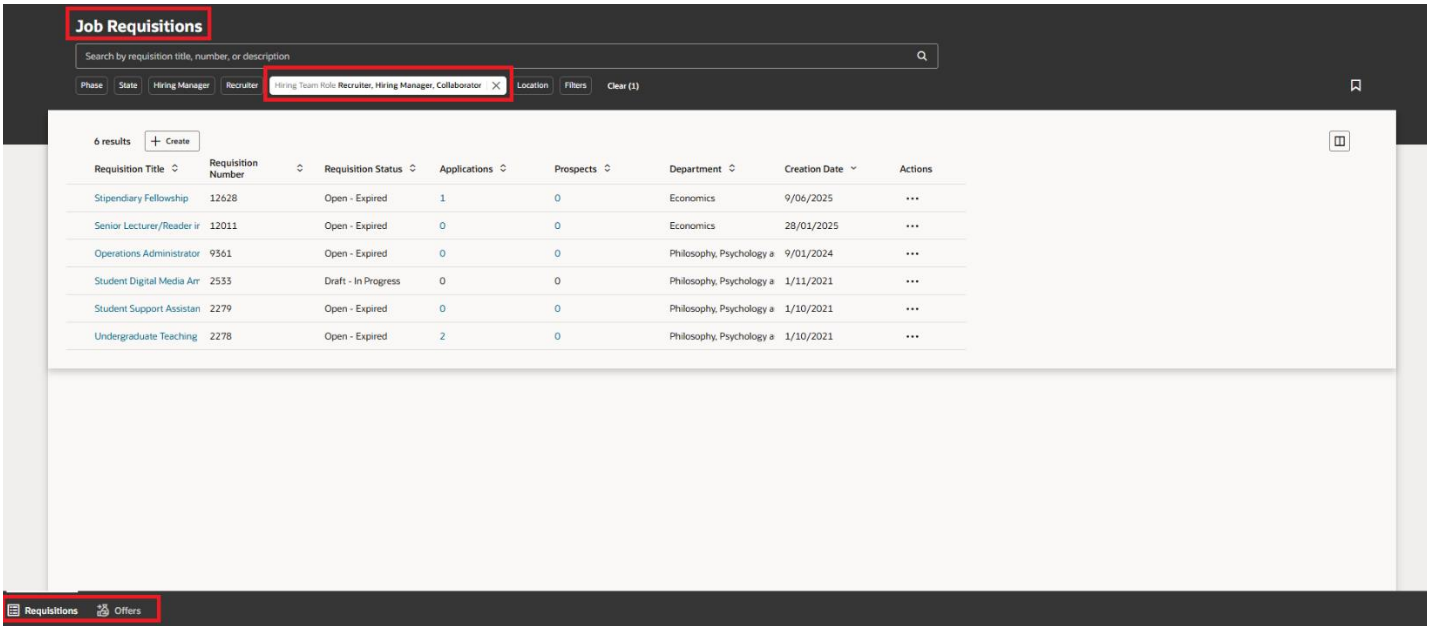
This section provides the detailed steps and includes relevant screenshots from the system. As a Line Manager or SDA you will see two tabs at the bottom of the screen, the default is requisitions where you will see all the job requisitions you are a hiring manager, recruiter or collaborator for, the other tab is Offers where you will see all candidates whom you have made an offer to and manage those offers.

Navigating the Hiring App – Requisitions

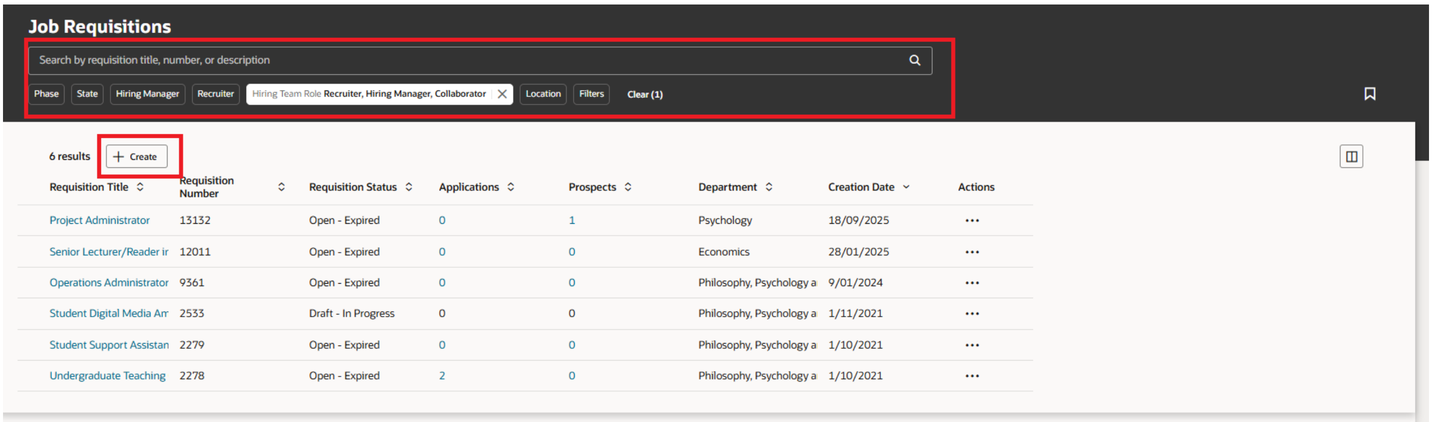
1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.



2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. You can also navigate to Offers from here.



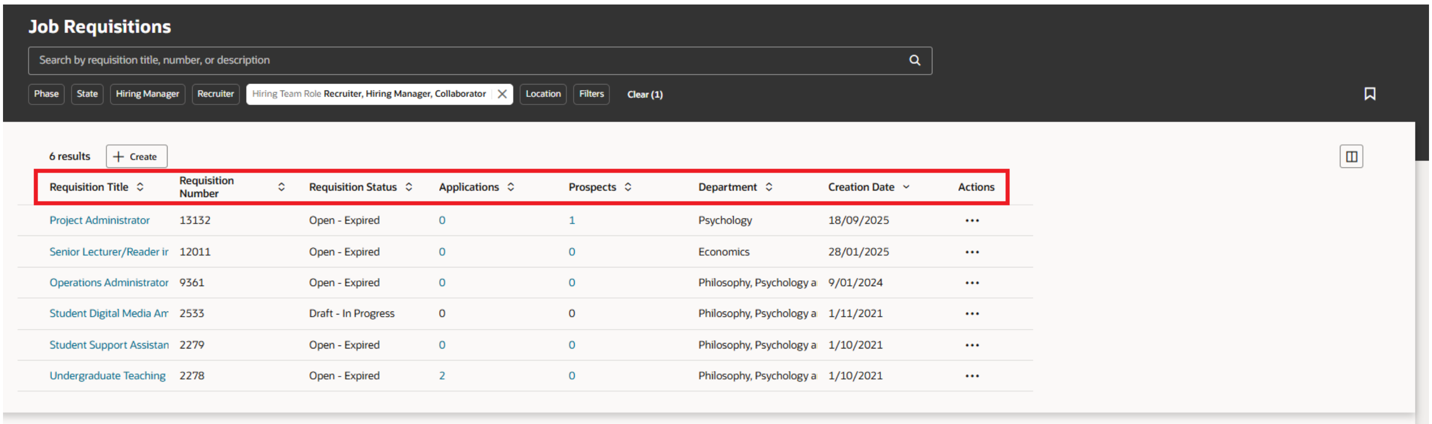
3. The search function and filters at the top of the screen allow you to quickly find a job requisition. You can also create a job requisition from here (see How to [Create and Manage a Job Requisition]() guide for details). To view inactive requisitions, click on filters to expand the list and scroll to the bottom of the list of filters and select the toggle button.



4. There are a number of columns of information you can view. You can customise and reorder these by clicking on the customise columns icon and then selecting the columns you would like to view. By default, the columns displayed are:

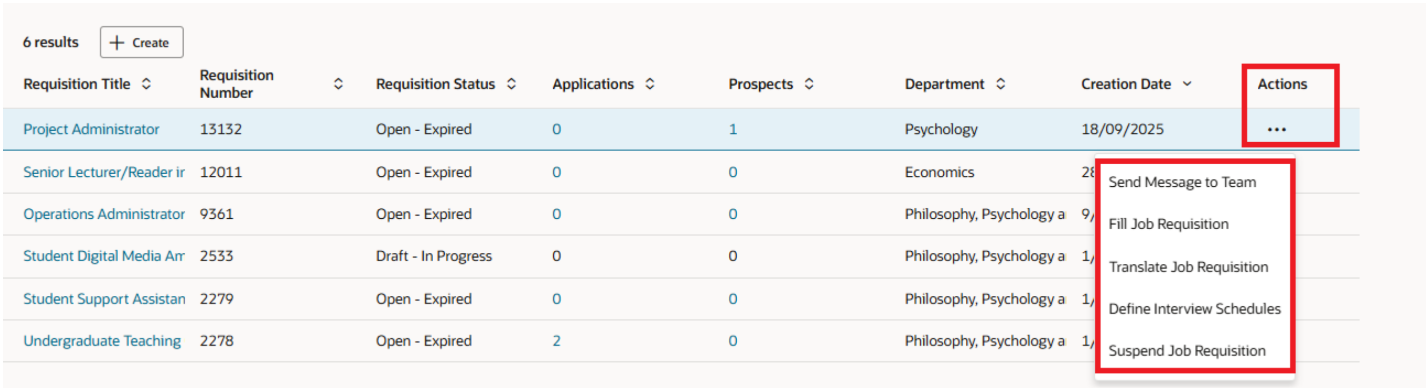
- Requisition Title – click on this to view the details of the requisition
- Requisition Number
- Requisition Status - (see [appendix 1]() for further details)
- Applications – All applications, click on the number to view the candidates list
- Prospects – are internal or external candidates that have been referred but have not yet applied
- Department
- Creation Date

If you can't see all of the columns press Shift + scroll on your mouse to view.



Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader ir	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Arr	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

5. **Actions** appear at the end of all the columns as a static field. Click on the ellipsis (3 dots) to take action on the Job Requisition, the actions displayed **will vary depending** on the phase and state of the requisition (example below).



Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
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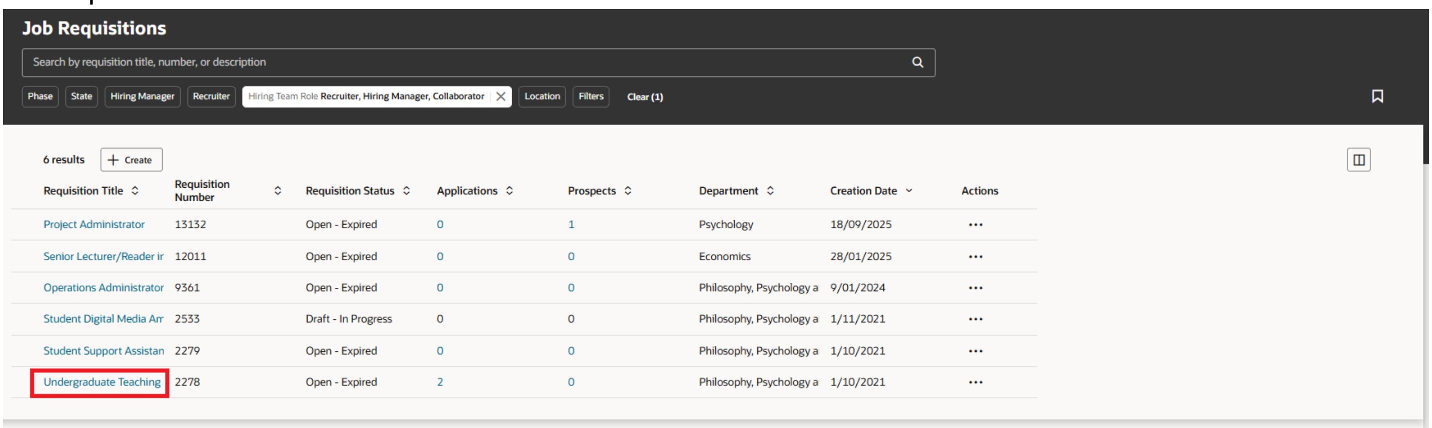
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/	
Student Digital Media Arr	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/	
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/	
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/	

Tip
Translate Job requisition is not in use

6. Click on the name of the Job Requisition to view the details. If the requisition is still in draft, this will take you back to the create job requisition screens to complete and submit. Once submitted for approval, you can view the details of the requisition by clicking on the requisition title from the requisition list.



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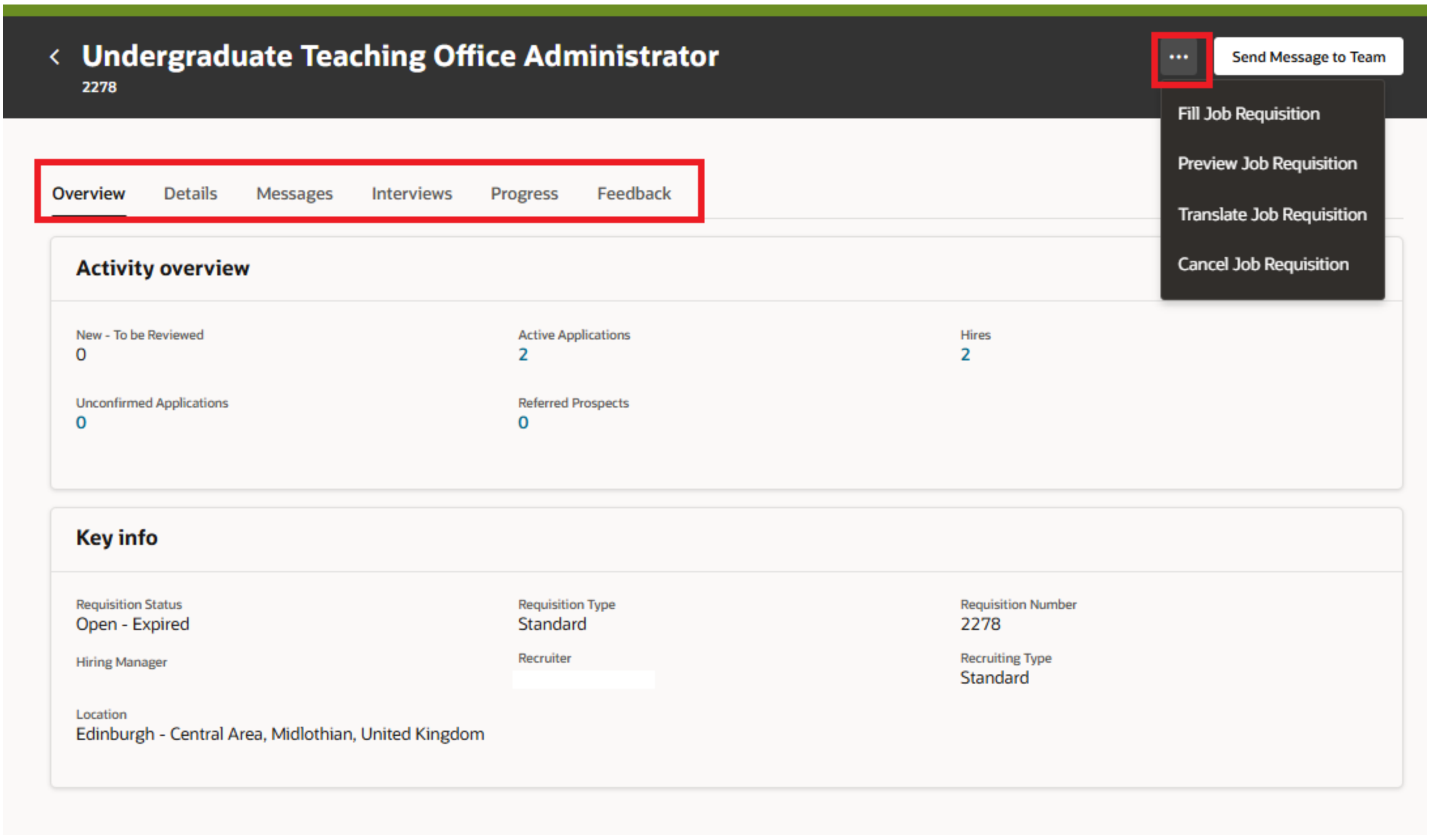
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Arr	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

7. The **Requisition Details** screen will then be displayed; you can navigate between the following sections at the top – these are dynamic screens based on the phase and state of the job requisition.
   - Overview – can view applicants from here by clicking on the number
   - Details – provides information about the requisition

- Messages – any interactions
- Interviews – to view any interview schedules
- Progress – a record of steps taken to post and hire to the role.
- Feedback – where you can see any feedback submitted



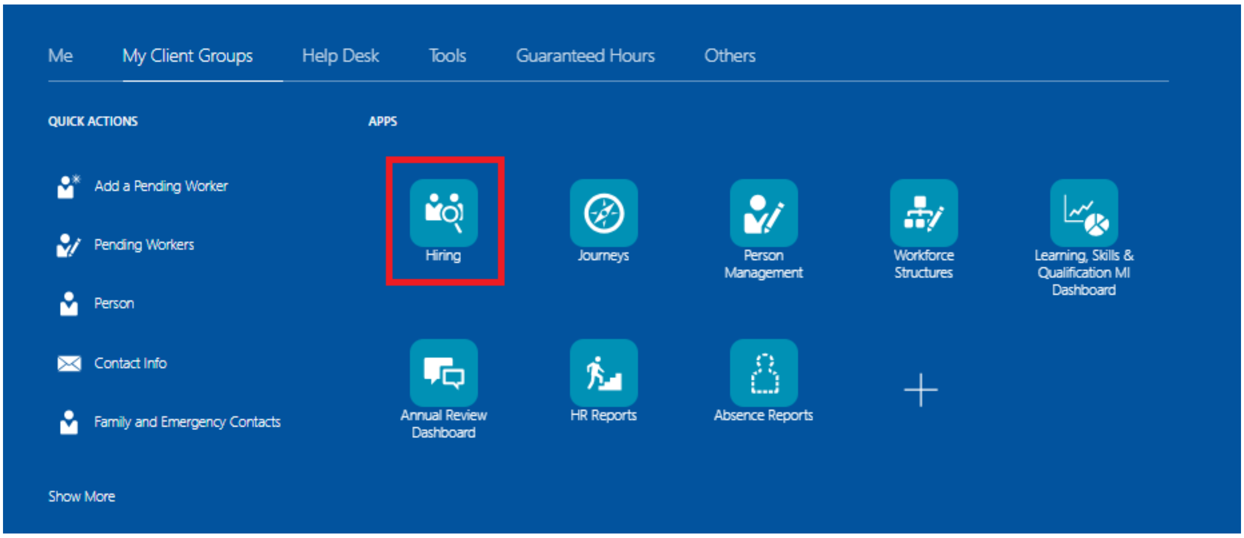
Tips

- The Action you can take depends on the phase and state of the Job Requisition. Some will be visible via the ellipsis (3 dots) and others more prominently available at the top of the screen. For example, to preview the job requisition or send a message to the hiring team**. Line Managers /SDAs should not use the actions move to posting or open for sourcing, these are <u>strictly for HR use only.</u>**

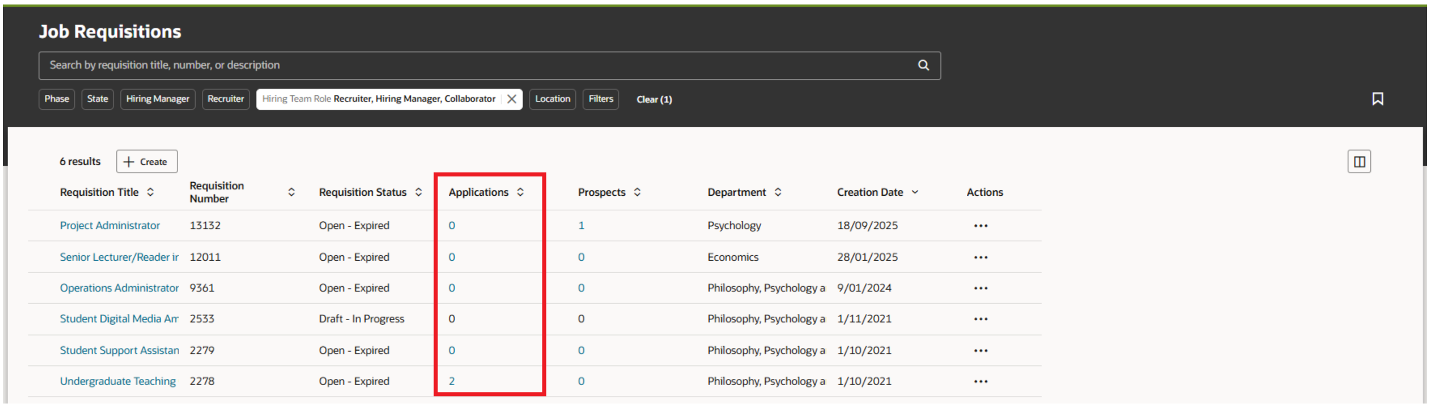
Tips

Manage Job Applications

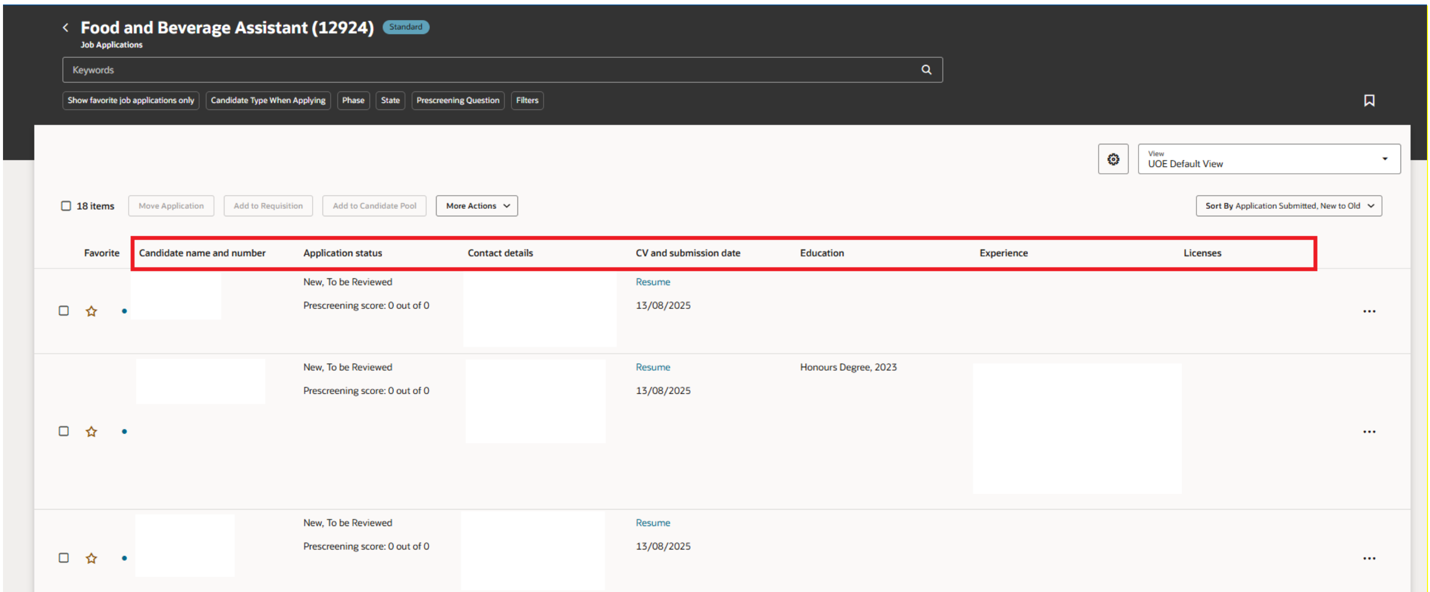
1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then Hiring.



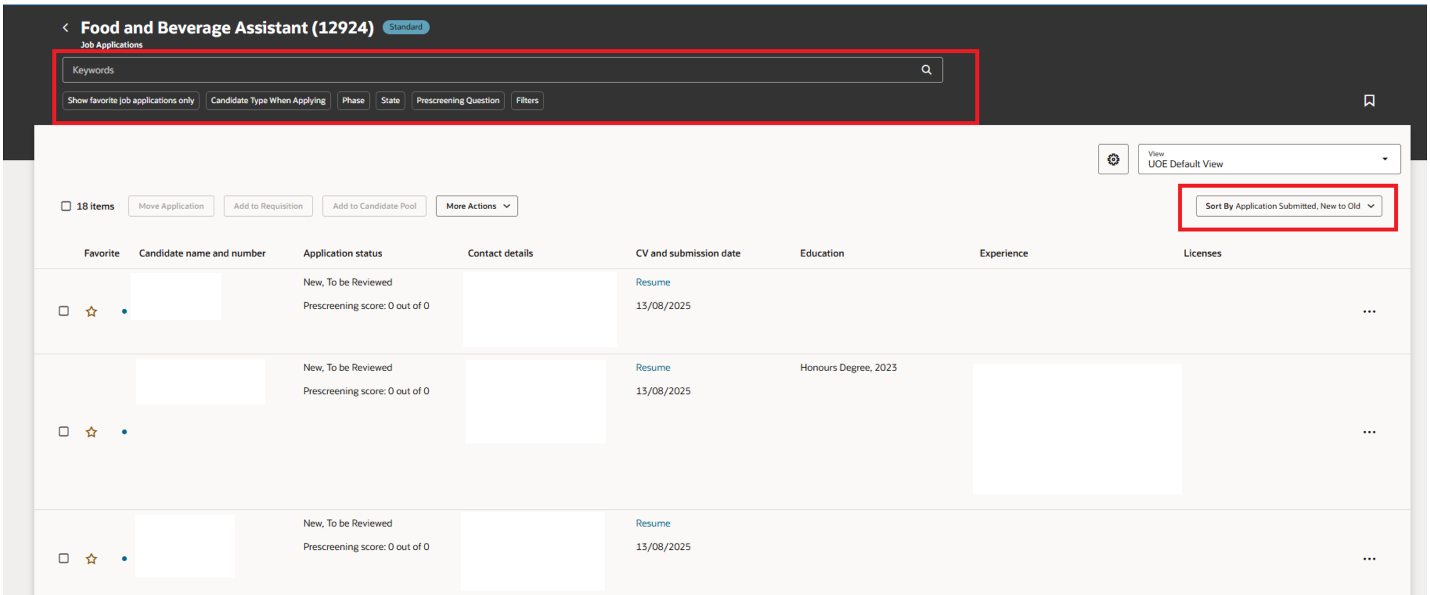
2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. The easiest way to view applications is by clicking on the number from the Applications Column.



3. The list of candidates for that requisition will be displayed, by default this will show active applications by application status, e.g. New, to be reviewed, those that have been moved to an interview phase, and those that are the offer phase. This screen provides a high-level overview of the candidate's record and links to the CV.

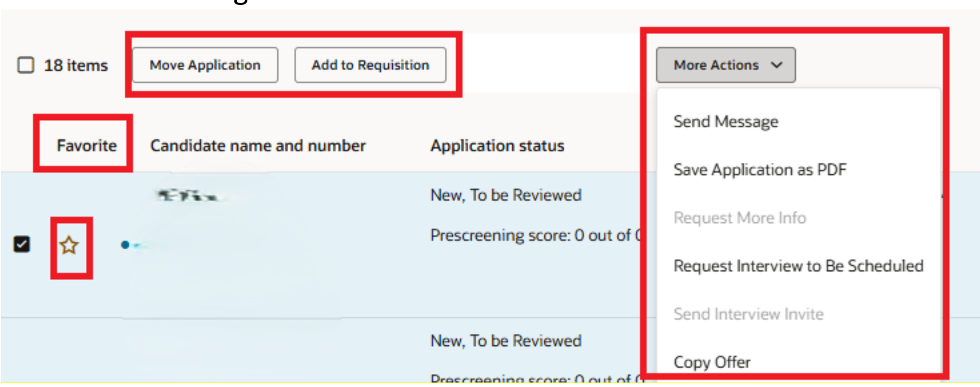


4. Using the keywords, filters or sort by at the top of the screen you can refine the list of candidates you wish to review, for example if you only want to view new applicants use the Phase and State 'New and To be reviewed' or candidates selected for interview use the Phase Interview. You can also filter based on answers to prescreening questions.



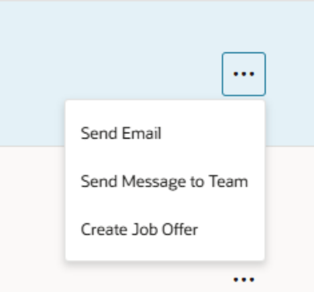
5. The Actions and More Actions at the top of the candidate list are available as bulk actions and depend on the phase and state of the candidate, select the candidates you want to take action for.

Some examples:
Move Application – allows you to update the phase and state for the candidate(s)
Add to requisition- allows you to add the candidates to a different job requisition
Send Message – to message the candidate
Save Application as PDF – to download as a PDF
Request Interview to be scheduled – messages the recruiter
Copy Offer - allows you to copy an existing offer in bulk.
Mark as Favourite – allows you to easily find favourite candidates, but the view only applies to you and not all of the hiring team.



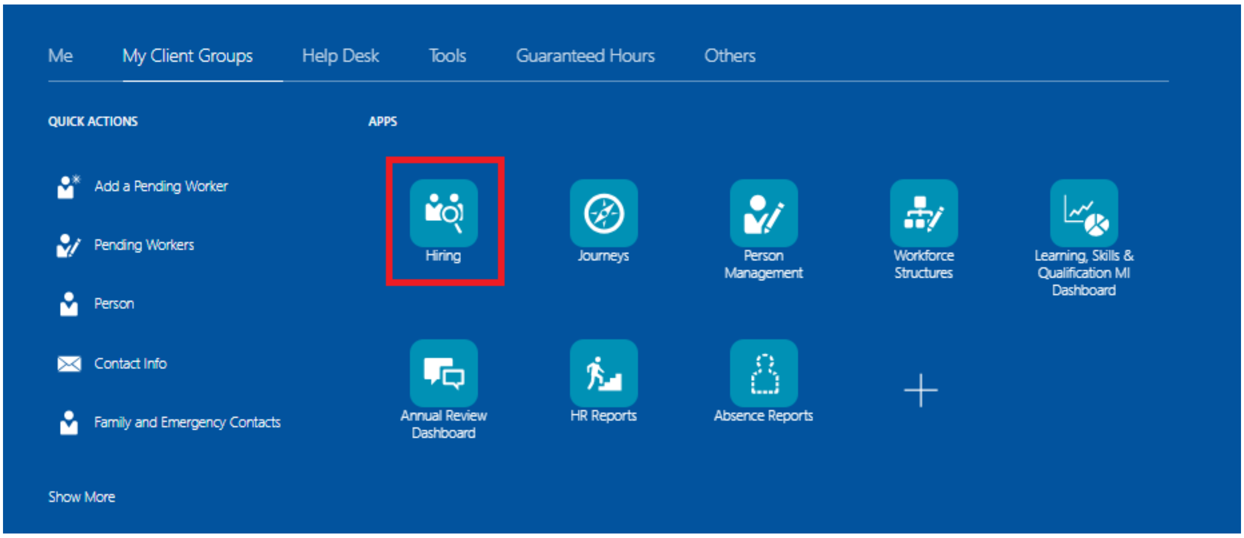
The actions using the ellipsis (3 dots) is candidate specific and depend on the phase and stat
e of the candidate

- Send Email – email to the candidate
- Send Message to team – message the hiring team
- Create Job Offer – takes you to the job offer screens

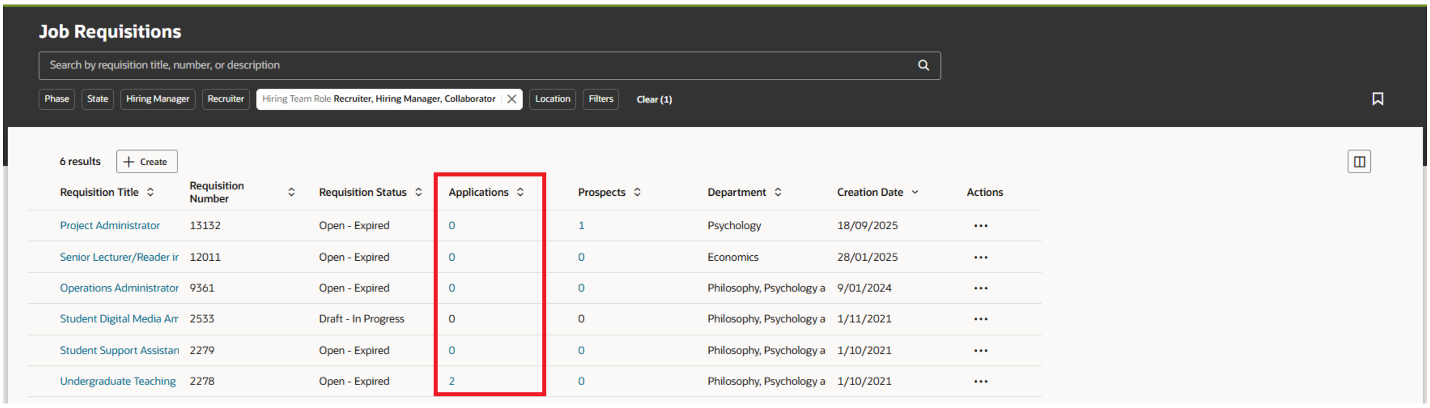


How to Review Applications and Take Action

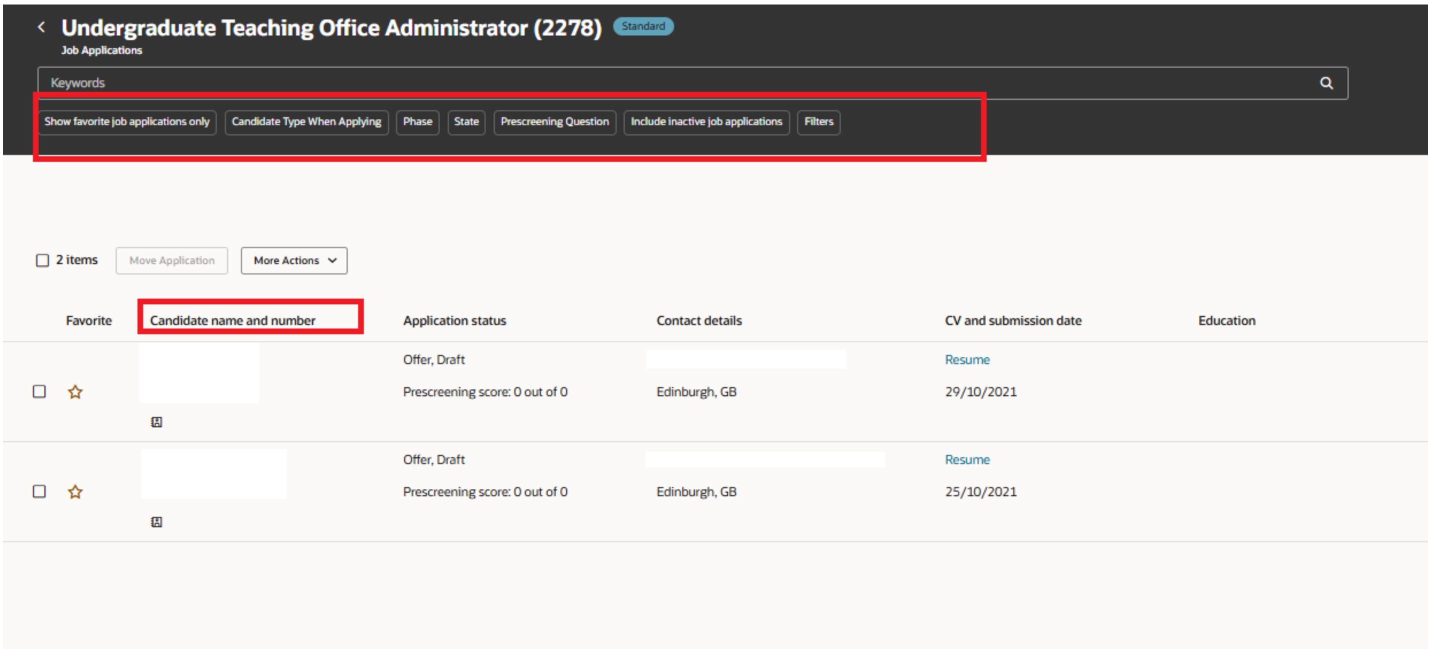
1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then Hiring.



2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. The easiest way to view applications is by clicking on the number from the Applications Column.



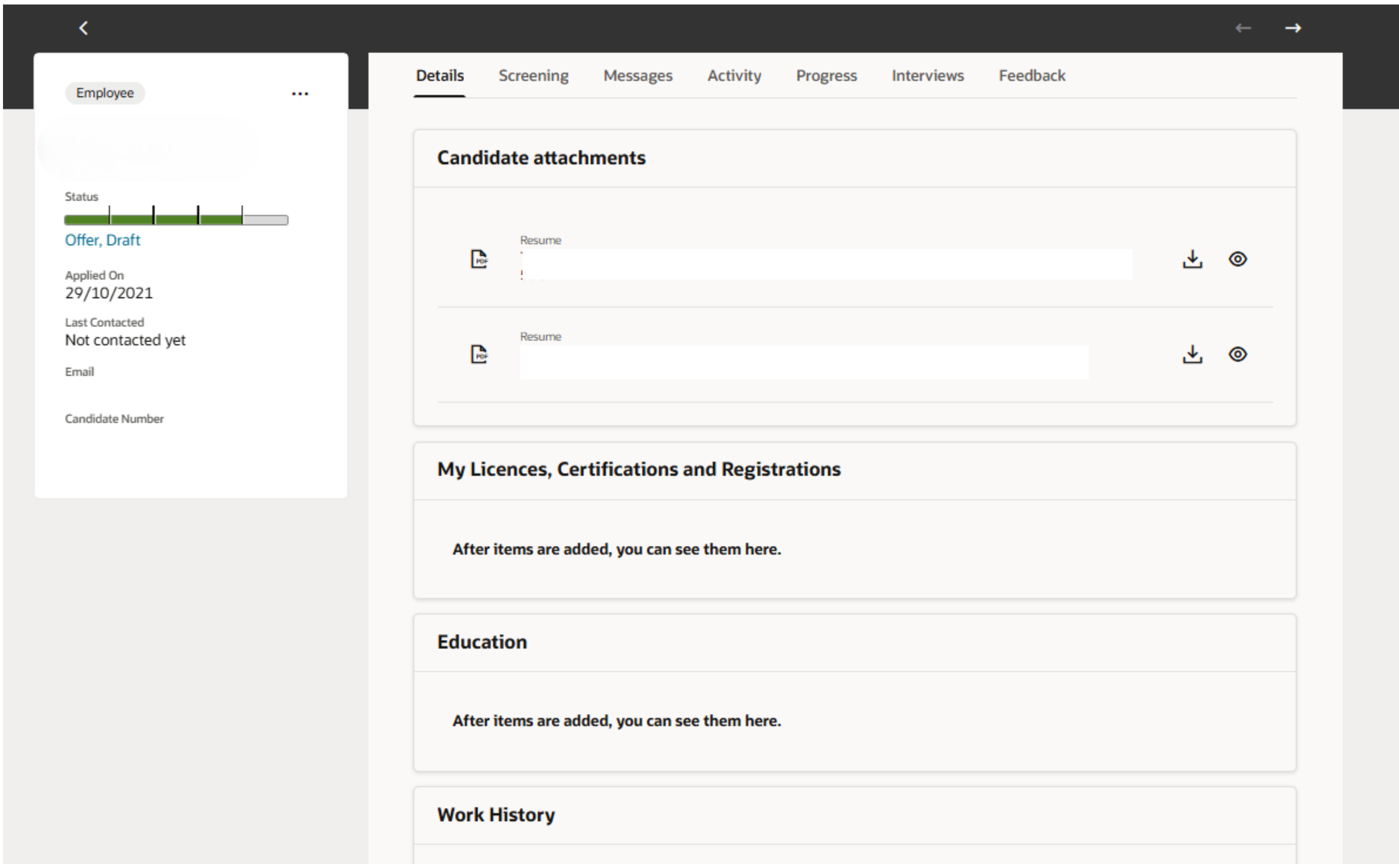
3. From the Job Applications Screen, click on the candidate's name to view the candidate's profile and application in full. Use the filters at the top of the screen to refine the list.



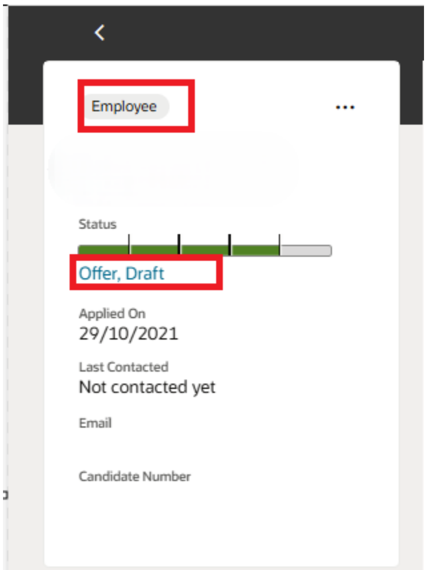
4. There are different sections you can review outlined below

- Details - view the candidate profile, application and attachments and referee details.
- Screening - review the answers to the pre-screening questions.
- Messages – to message the candidate (text /WhatsApp messages not available for use)
- Activity - add internal attachments and view referee details
- Progress – history of job application progress
- Interviews – details of any interviews scheduled through the system
- Feedback – details any feedback given by the hiring team
- Offer – offer details (will only appear for job offers once in approval stage, not shown on screen shot)

Use the left and right arrows at the top of the screen to move to the next candidate in the requisition list or click the back arrow on the left to return to the full list of candidates.

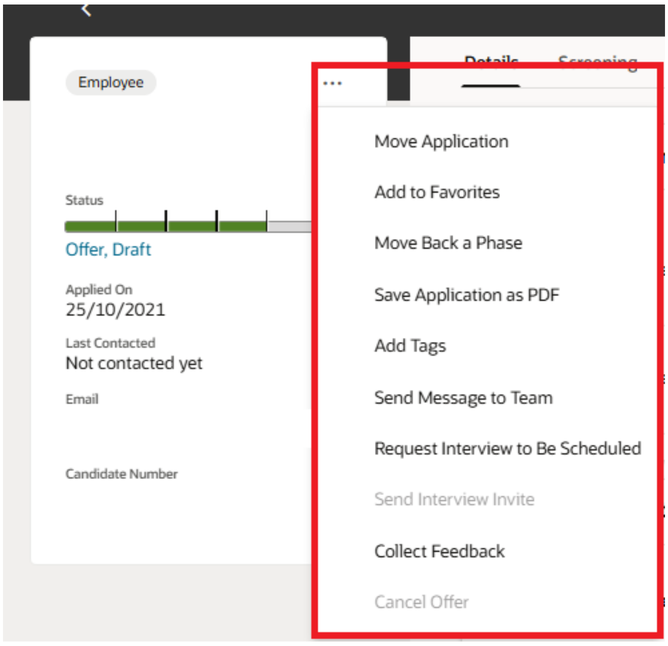


5. On the left hand of the screen, you will see some key contact information for the candidate and a progress bar, which shows the phases completed and current phase, click on the link to see further details in the Progress tab. You can also see if the candidate is a current employee or an external applicant.



6. Click on the ellipsis (3 dots) to take action, for example, to add the candidate as favourite, move the application (to update the phase and state) or create a job offer. The actions depend on the candidate's phase and state. Some examples:
    - Move Application – update the phase and state

- Add to Favourites – for ease of finding again, noter this is only visible to you, not to the hiring team
- Move Back a Phase – to move the candidate back to a previous phase
- Save Application as PDF – to download the application
- Add Tags – not in use
- Send Message to team – to email the hiring team
- Request Interview to be scheduled
- Collect Feedback – allows you to gather interview feedback from the hiring team
- Create Job Offer – allows you to create the job offer for the candidate



Bulk Actions including Bulk Print

You can take action in bulk from the Job Applications list by selecting all the candidates you wish to take action for. This could, for example, be to move several candidates to a new status e.g. move selected candidates to interview.

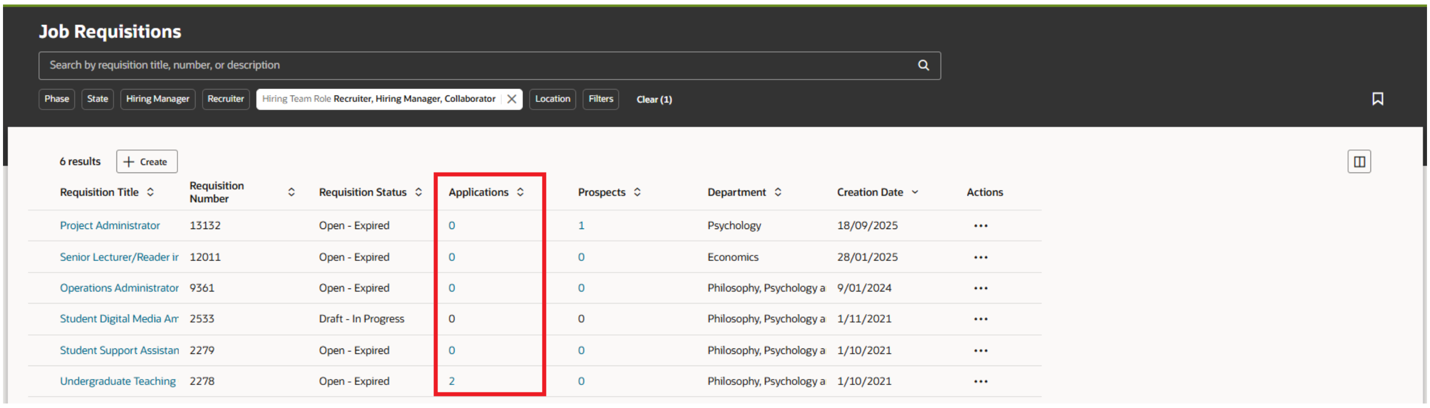
To enable accurate university and statutory reporting of the recruitment process please move candidates through each phase in chronological order, for example from New to Screening to Interview to Offer. Once the successful candidate(s) have accepted their offer you should check that any remaining candidates sitting in previous phases have been moved to an appropriate end status (rejected or withdrawn).

Candidates can be moved to the appropriate phase and state individually or in bulk through the hiring app. See Appendix 2 for a full list.

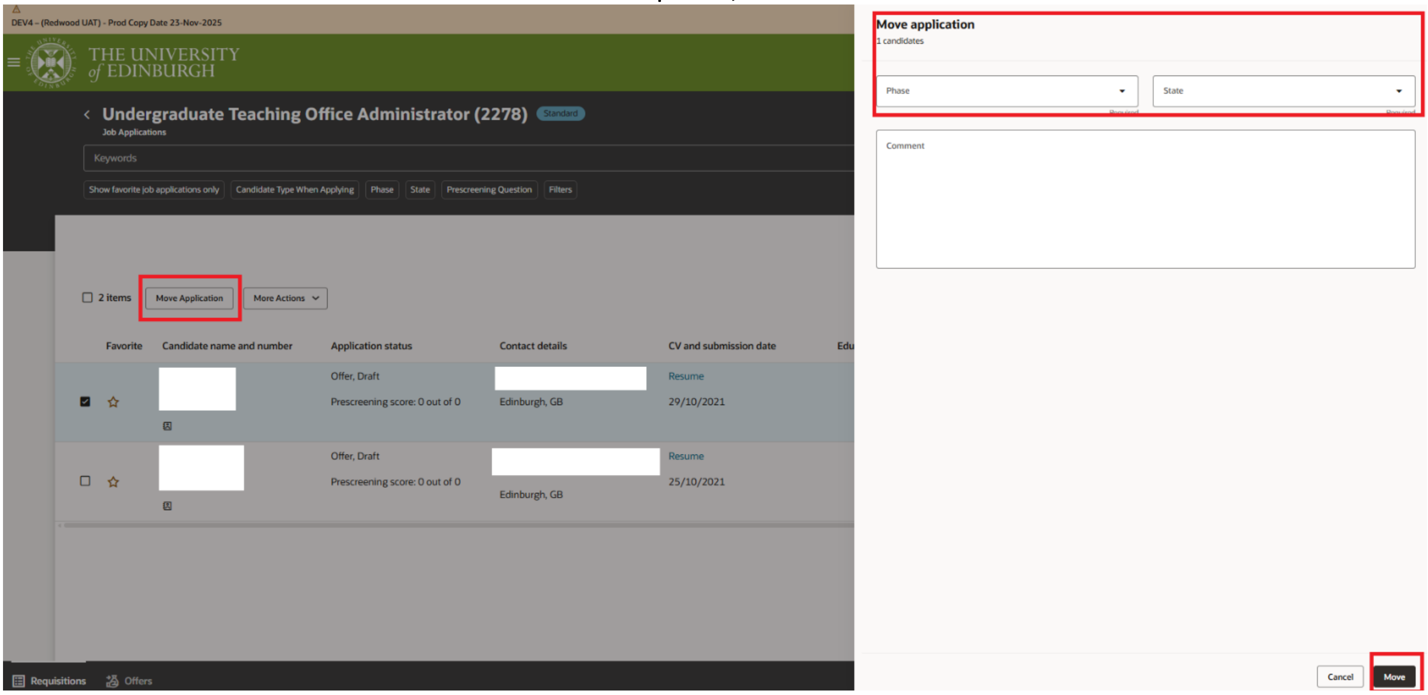
You can also bulk print (download) selected or all applications (in batches of up to 100). **To bulk reject candidates please read the section below.**

Bulk Move

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.



2. Select the candidates you wish to move and click Move Application at the top of the list, update the Phase and State and add a comment if required, then click **Move.**



3. The candidates Application status will then be updated.

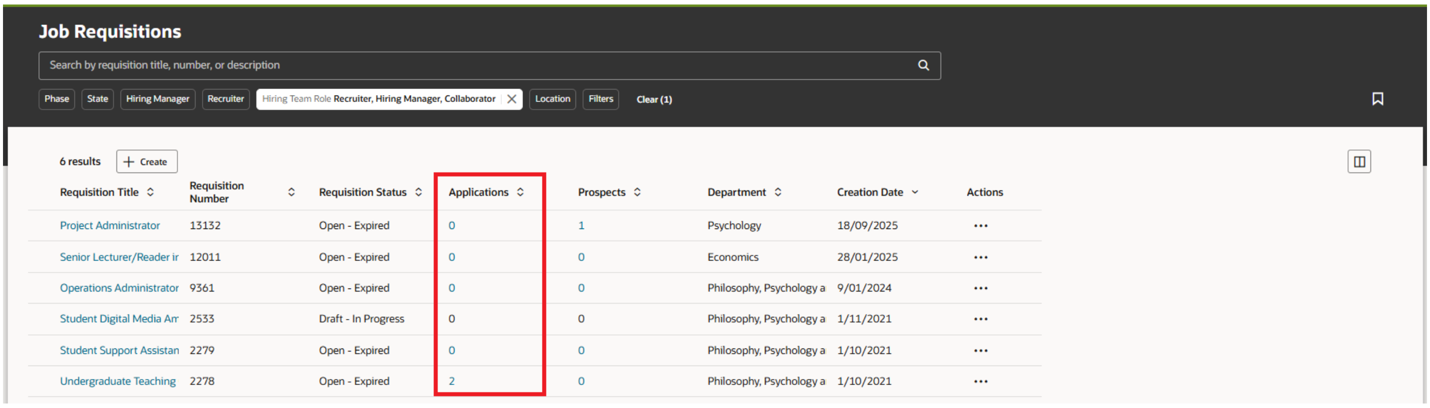
Tips

- If you bulk update the candidate phase and state **this will be visible** to the candidate, should they view their application status, therefore care should be taken if particularly if updating to an end status e.g. rejected by employer that appropriate correspondence is also sent to the candidate.

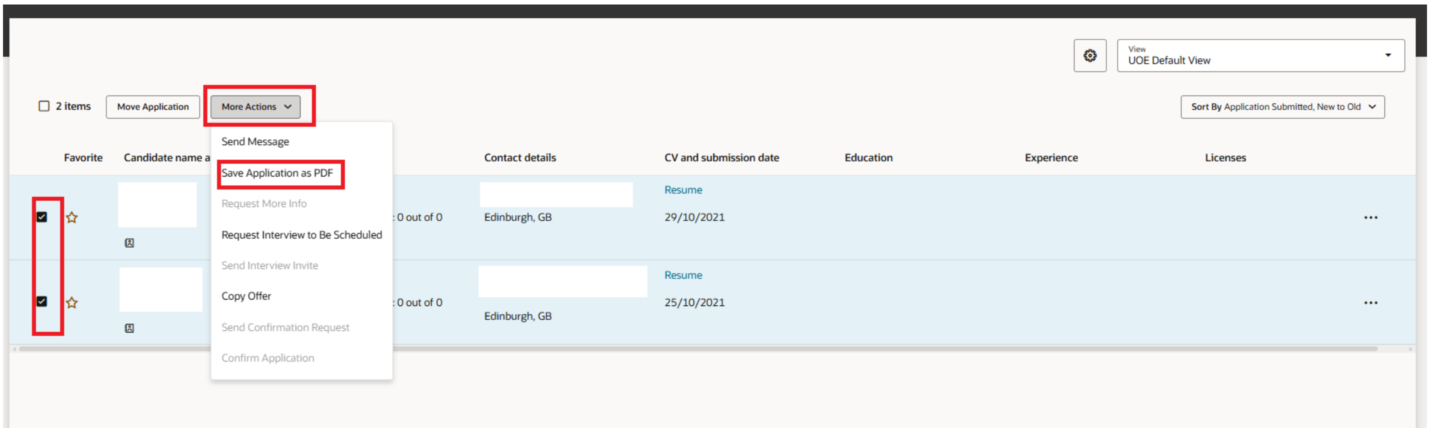
- Under GDPR, candidates can request information about their application including all notes (online and offline). Care should therefore be taken to ensure any comments are in keeping with the principles of fairness, equality, dignity, and respect.

Bulk Print (Save Application as a PDF)

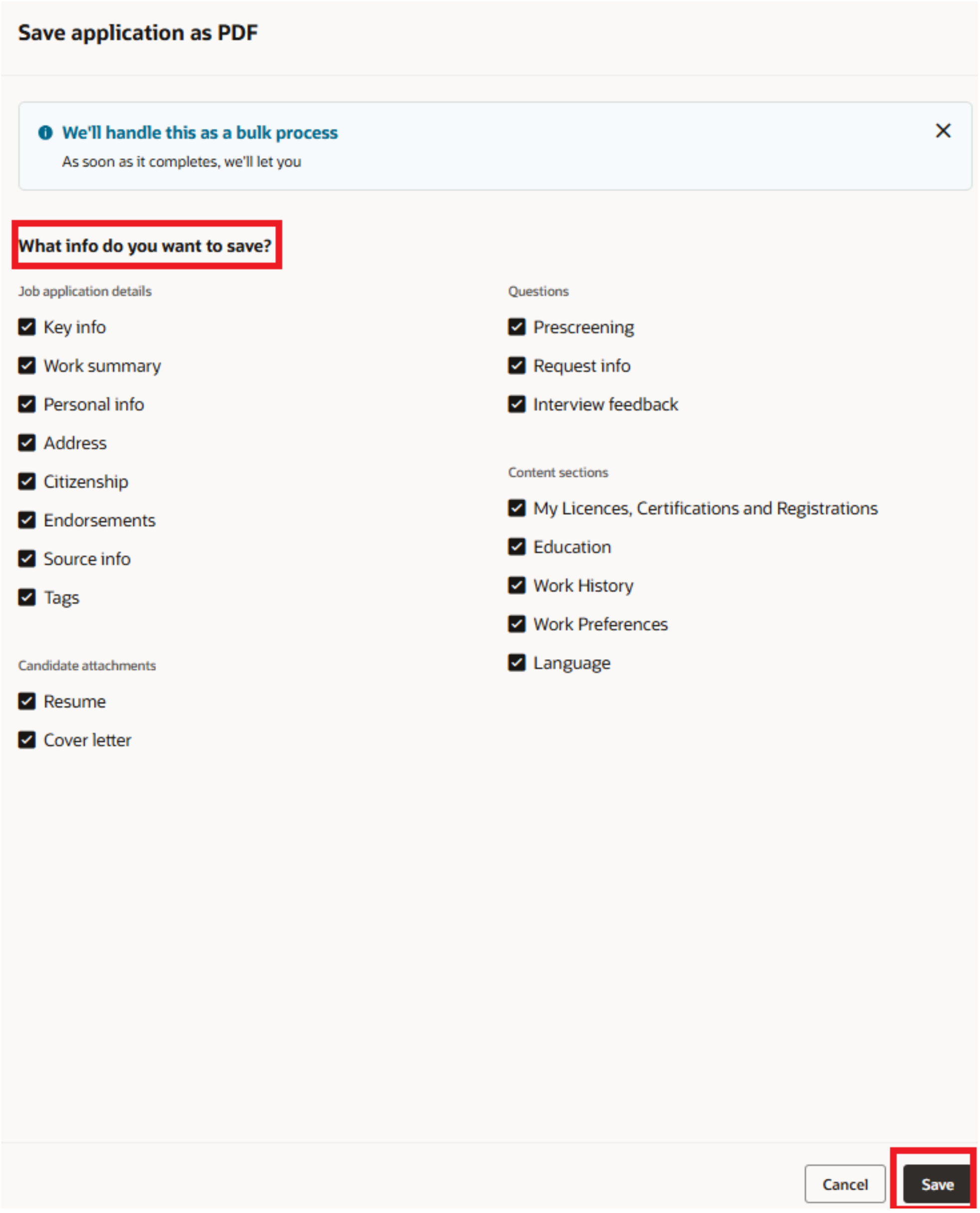
1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.

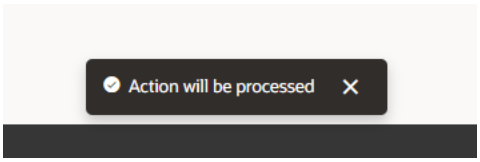


2. Select the candidates you wish to bulk download and click on **More Actions**, then select **Save Application as PDF.**

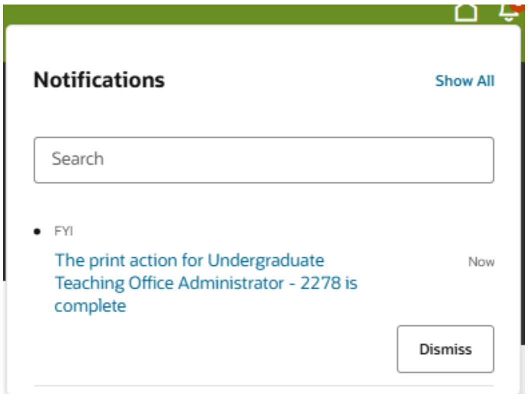


3. Deselect any details you do not wish to include, then click **save**. You will then see an ‘Action will be processed’ pop up box at the bottom of the screen.





4. Once the bulk print job has completed you get a notification via the Bell Icon and an Email with the zip file containing all the applications you selected.



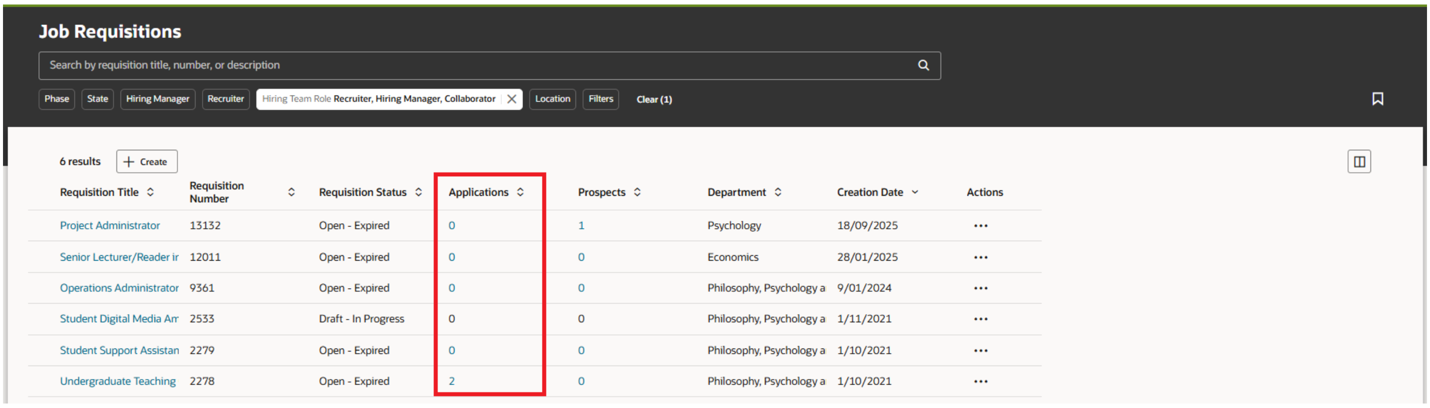
Tips

- You can only download in batches of up to 100.
- Miscellaneous documents added by the candidate at application stage **will not be included** in the download and will need to be downloaded individually.
- **Internal Candidates** – the download **will only include** the most recently uploaded document. If separate documents are added at the time of application for a CV and Cover Letter, only the most recently added document will download. Candidates are advised to attach all documents in a single file at the time of application. You can still view and download these documents individually within the candidate's record (Details section).

Adding Documents to a Candidates Record

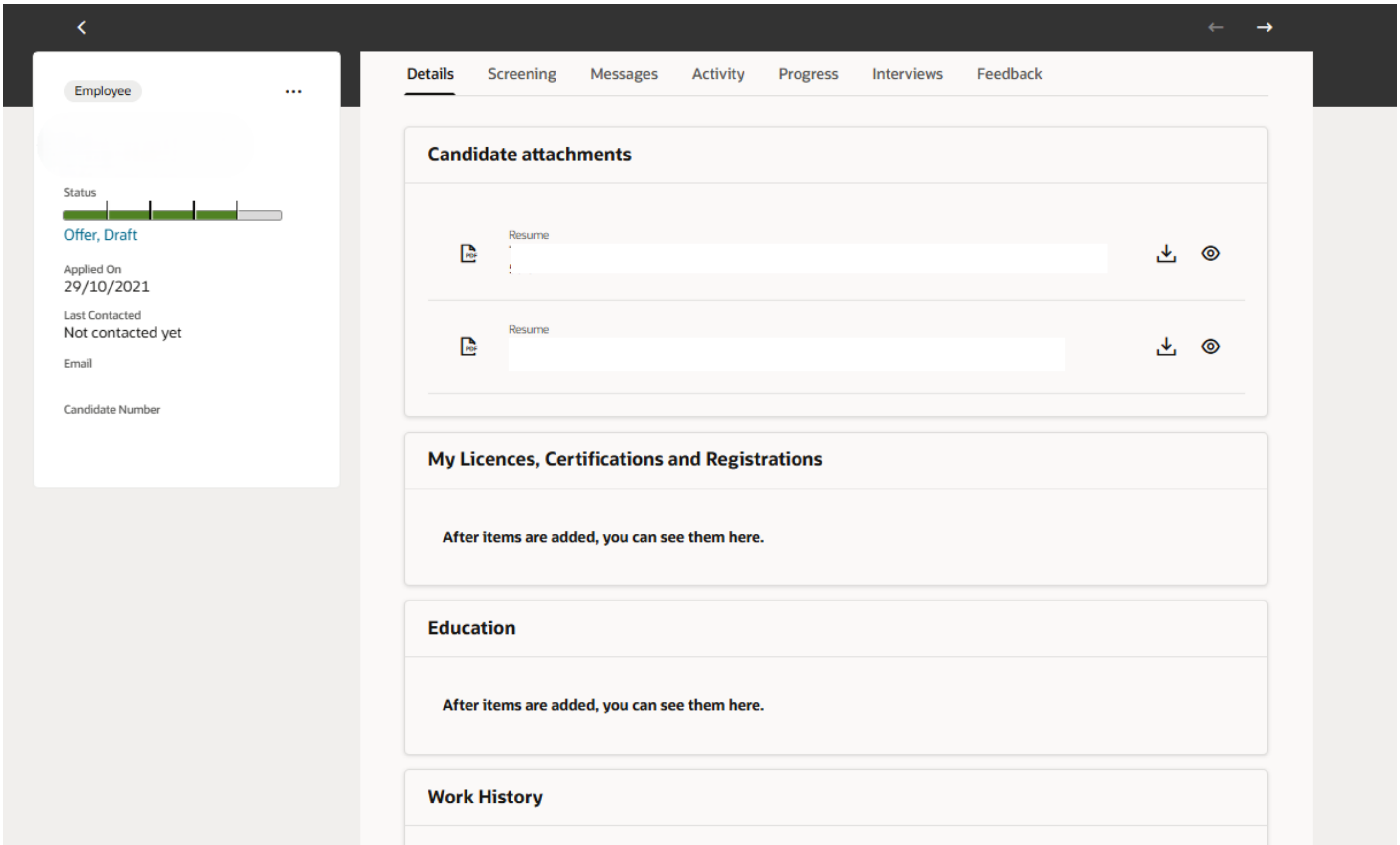
There are instances where documents may be added to a candidate's record. For example, when references are sought for the interview process or interview documents are to be added for the panel. To add any documents to the candidate's record follow the below steps.

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.

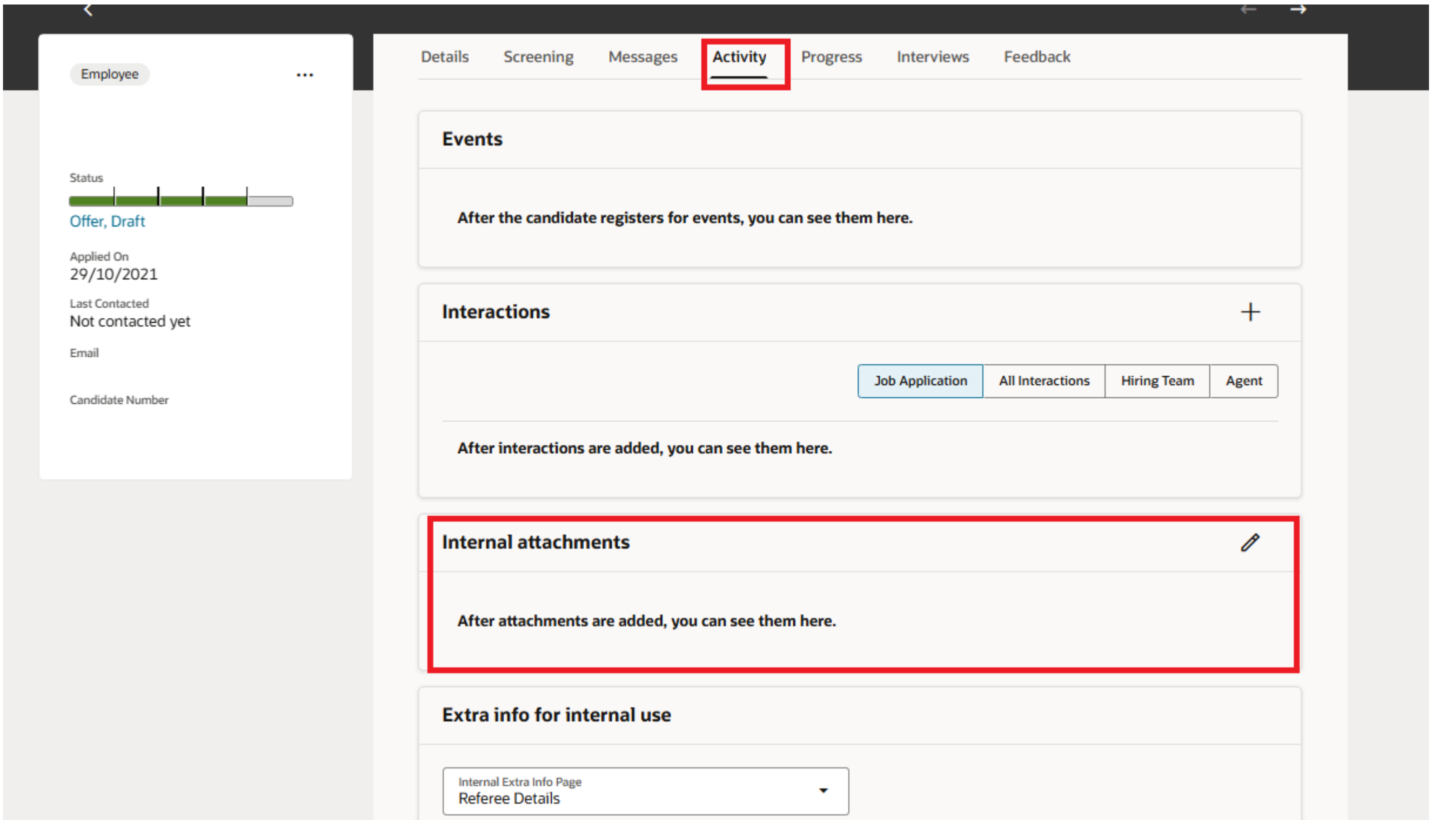


From the Job Applications Screen, click on the candidate's name to view the candidate profile, then navigate to the Activity Tab, documents.

2.



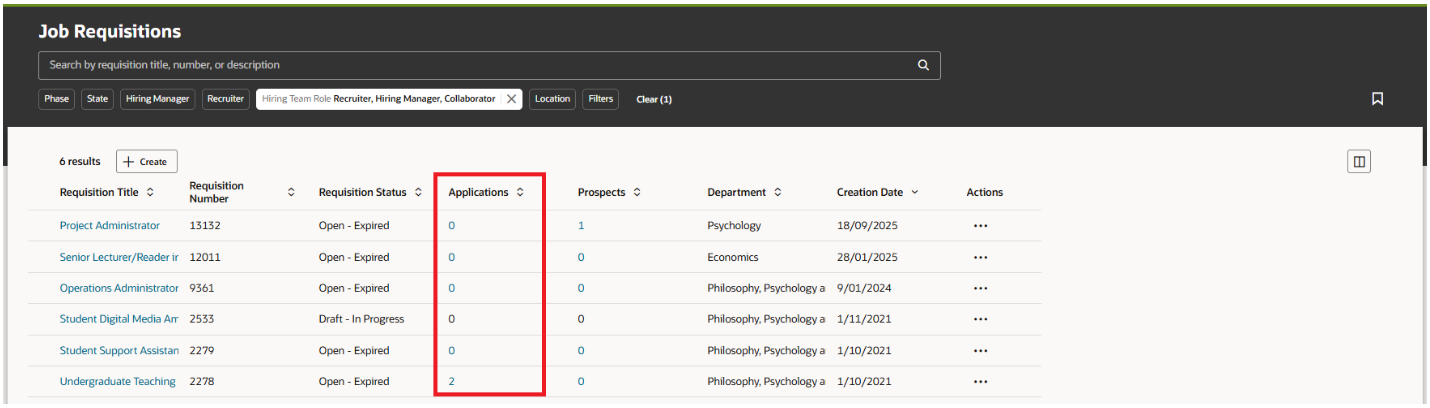
3. In the Internal Attachments section, click on the pencil icon and upload the document(s). Any documents added here are visible by the hiring team only.



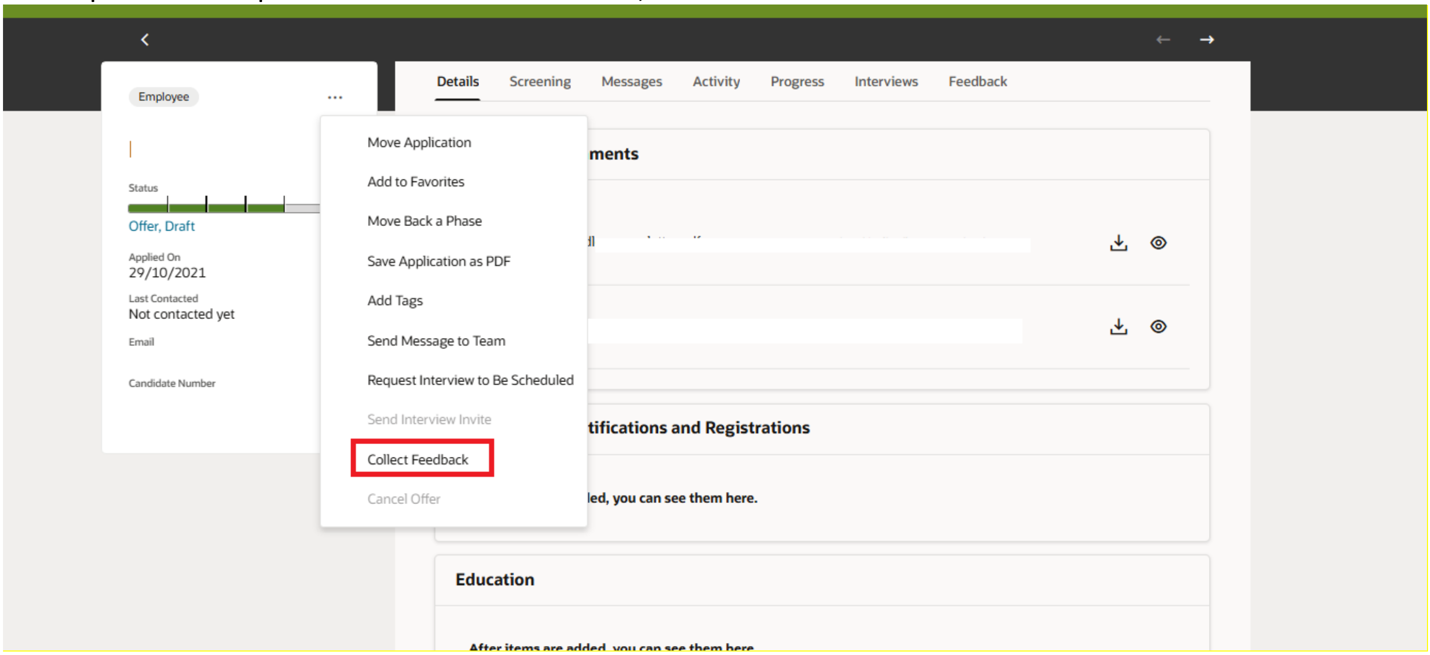
Collecting Feedback after Interview

This functionality allows you to collect interview feedback from the panel. This action can only be performed at an individual candidate level and if the Interview Questionnaire was added at Job requisition creation.

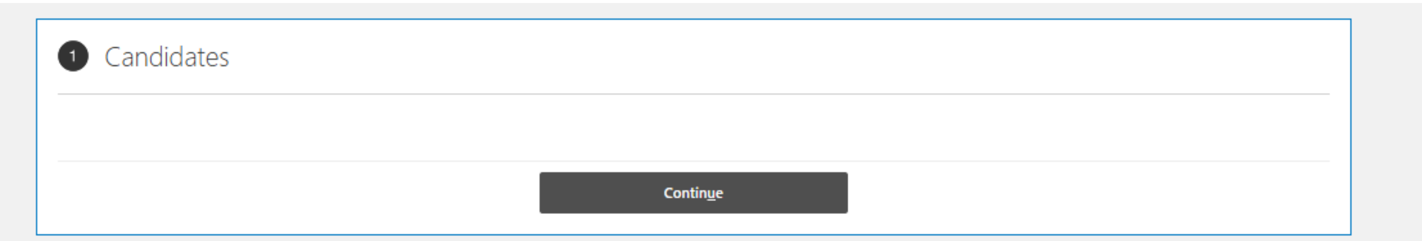
10. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.



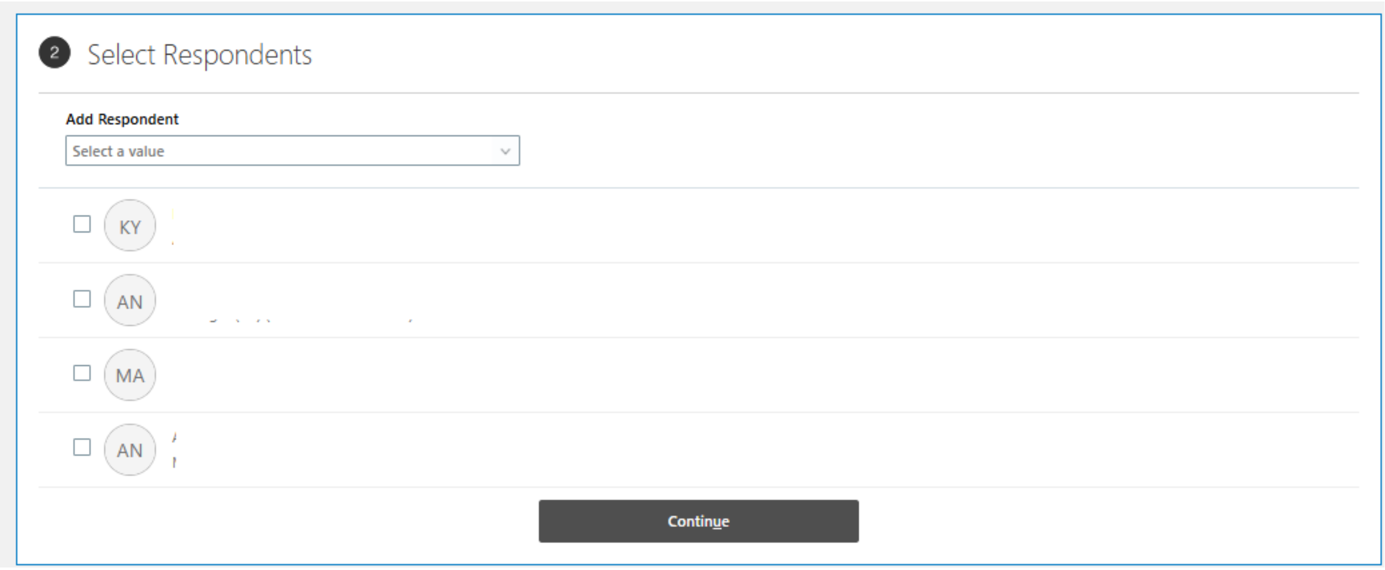
11. Select the candidate you wish to gather feedback and on the candidate details screen select the ellipsis at the top left of the candidate details, then select Collect Feedback.



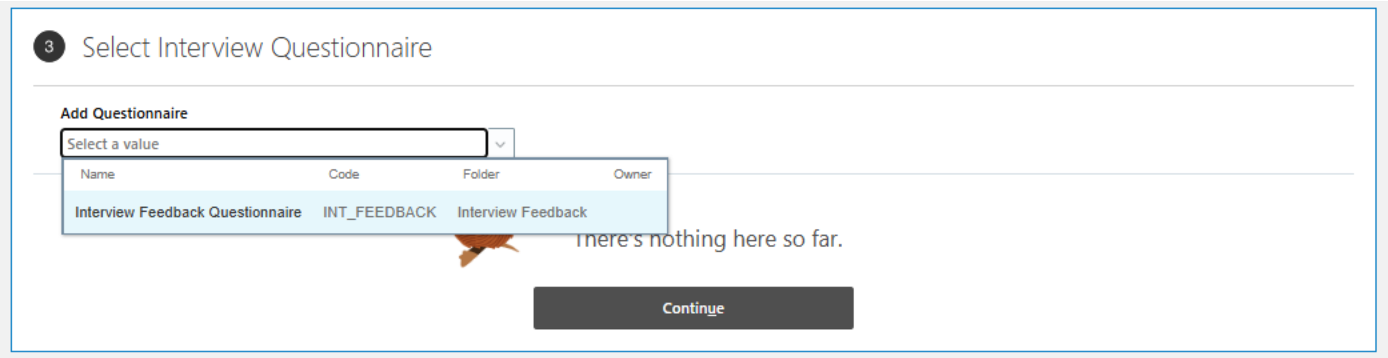
12. Click continue in the Candidates section



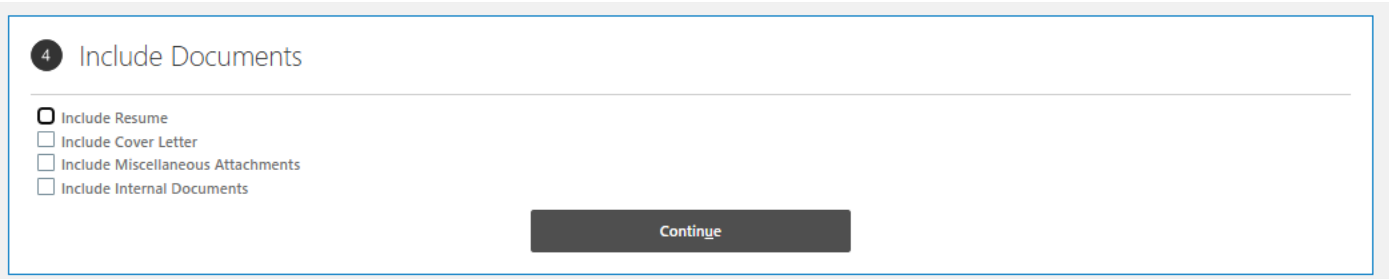
13. Select the respondents from the list or add a name manually, then click continue.



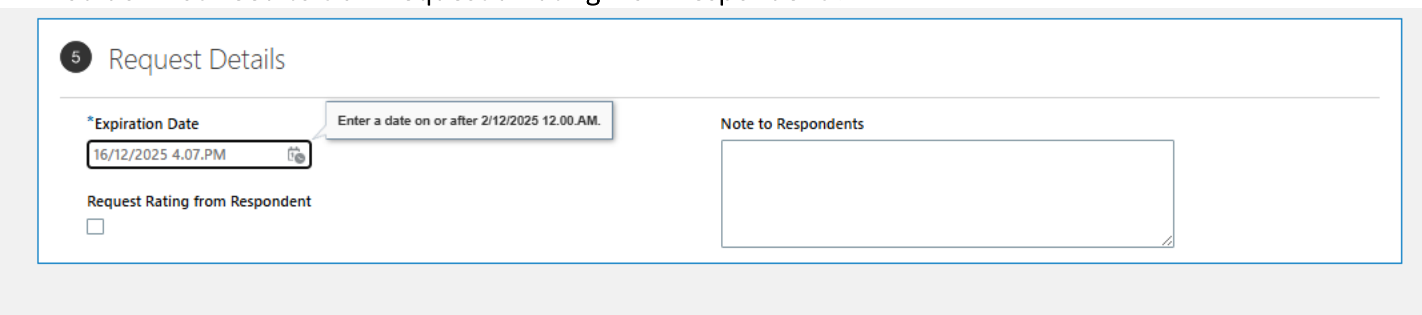
14. Select the Interview Questionnaire from the drop down, then click continue.



15. Ignore Include Documents – this is not required, unless you wish to attach any of the documents listed with the request, then click continue.



16. Request Details – amend the expiration date and time as required and add a note for respondents. You don not need to tick 'Request a Rating from respondent'.



17. Then click Submit at the top of the screen.

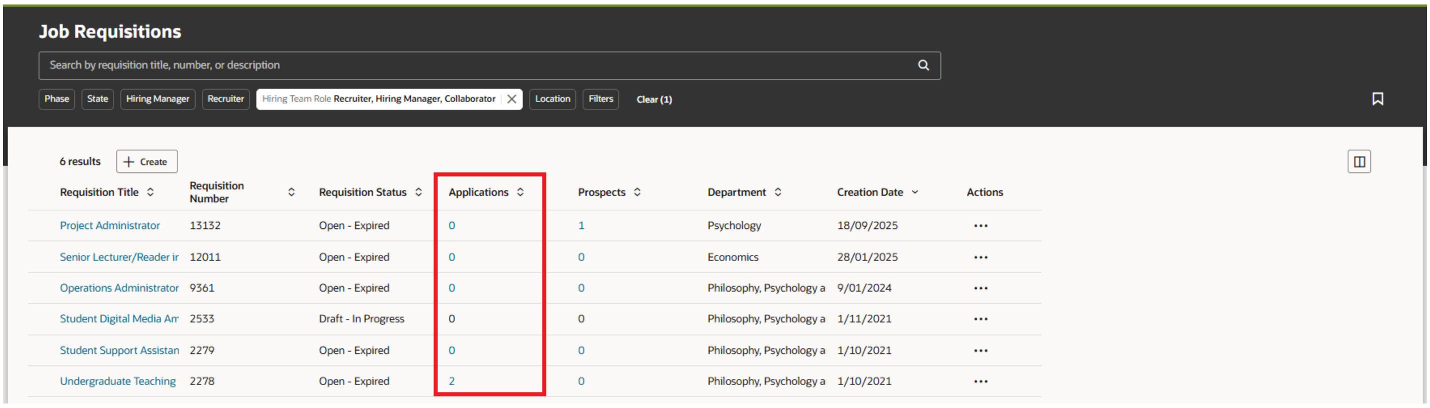
18. When the respondents have completed the interview feedback questionnaire, you will receive an email and notification on the Bell icon. This can also be viewed in the Feedback tab of the candidate's

record.

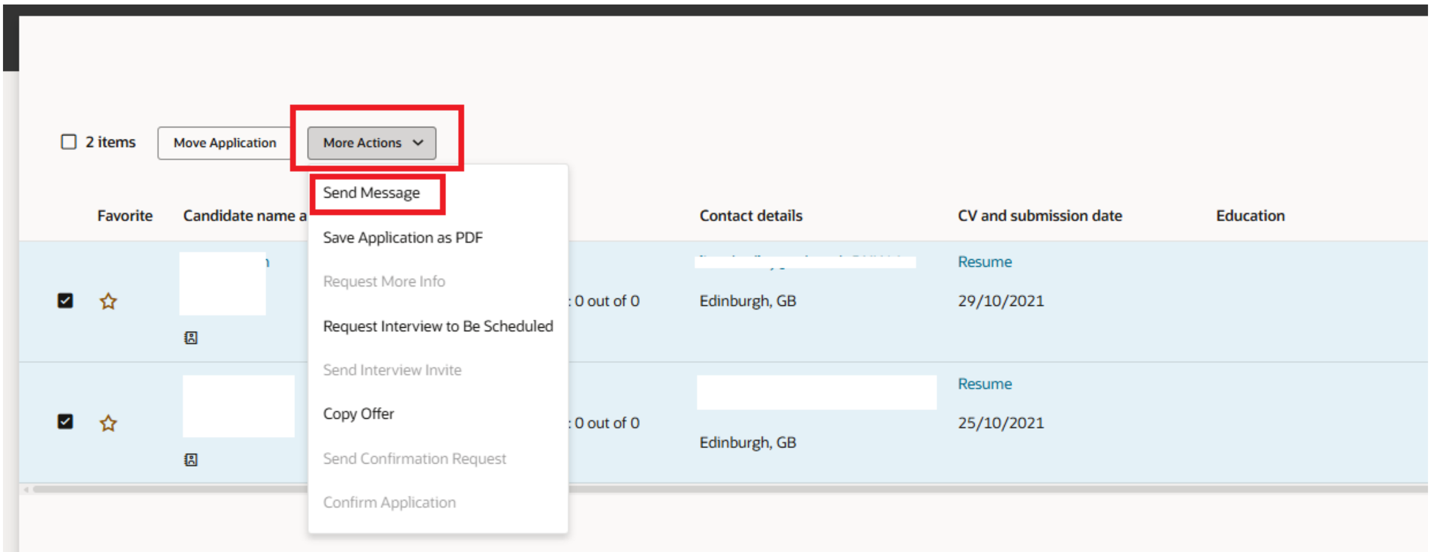
How to Reject Candidate(s)

Please note that this is a **two-step process;** you should send an email using the templates provided to the unsuccessful candidate(s) **before** updating the phase and state.

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.

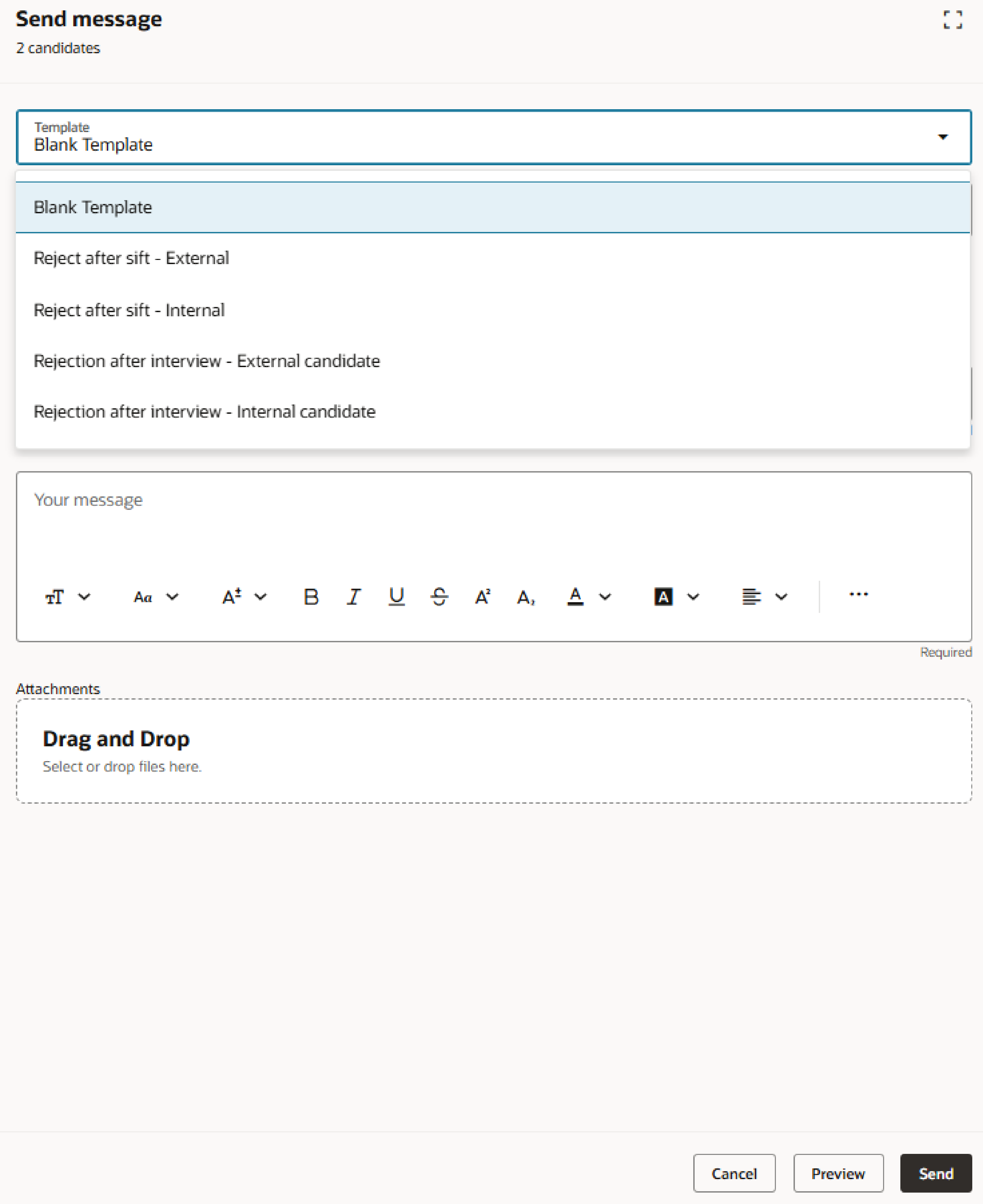


1. Select the candidate(s) you wish to send a message to and click More Actions and select Send Message



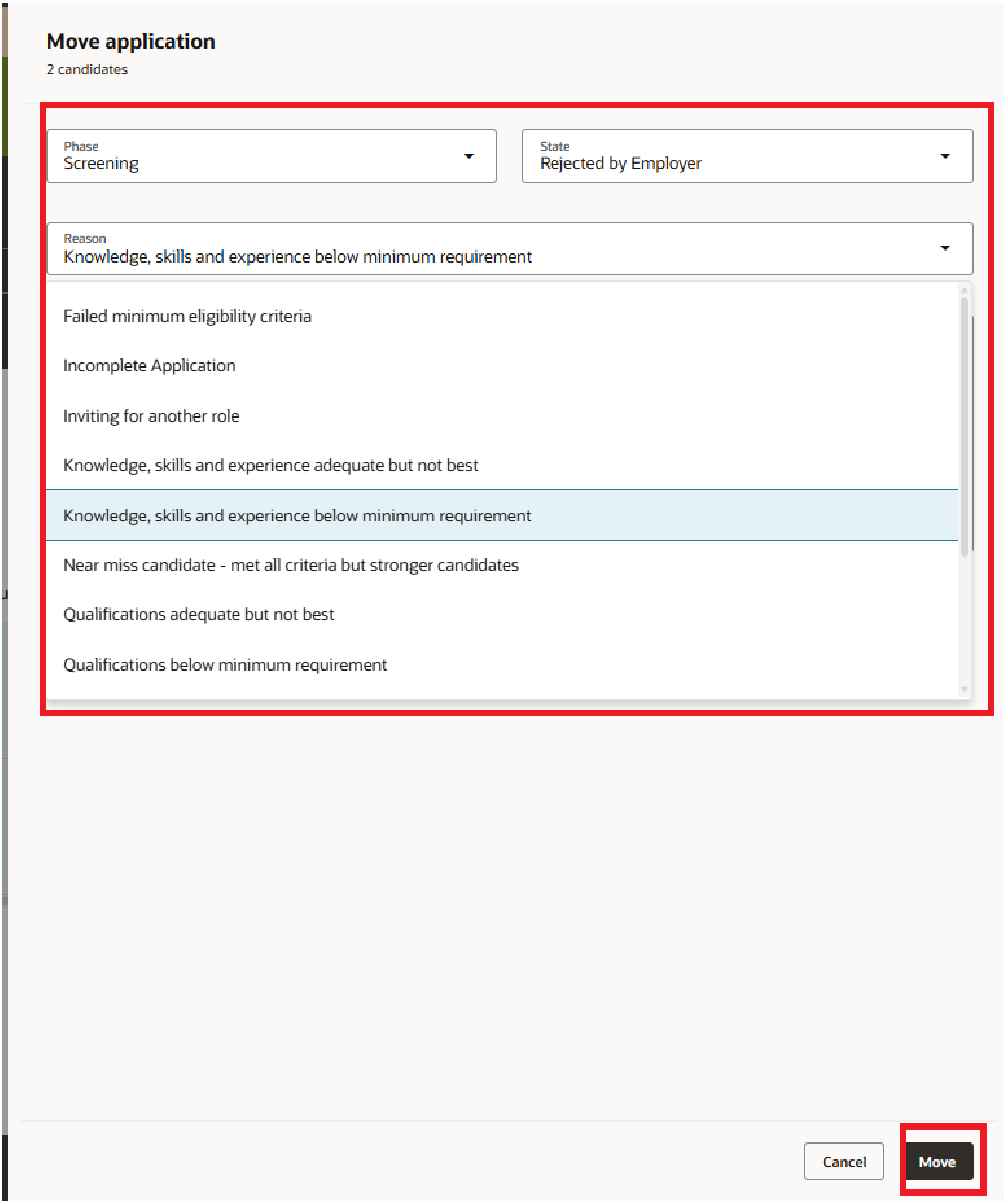
1. A send message box will appear on the right of the screen. In the Template field choose from the appropriate template
   - Reject after sift – External (for external candidates)

- Reject after sift – Internal Rejection (for internal candidates)
- Rejection after Interview – External Candidate
- Rejection after Interview – Internal Candidate
- Select Blank Message to create your own
- Preview the message before clicking send, you can edit this if you wish.
- **Please DO NOT use the Tokens functionality**



6. Return to the Requisition candidate list to update the Phase (e.g. Screening) and State to **Rejected by Employer**. Select the candidates, then click on more actions, update the phase and state and add a

comment if required, then click **Move.**

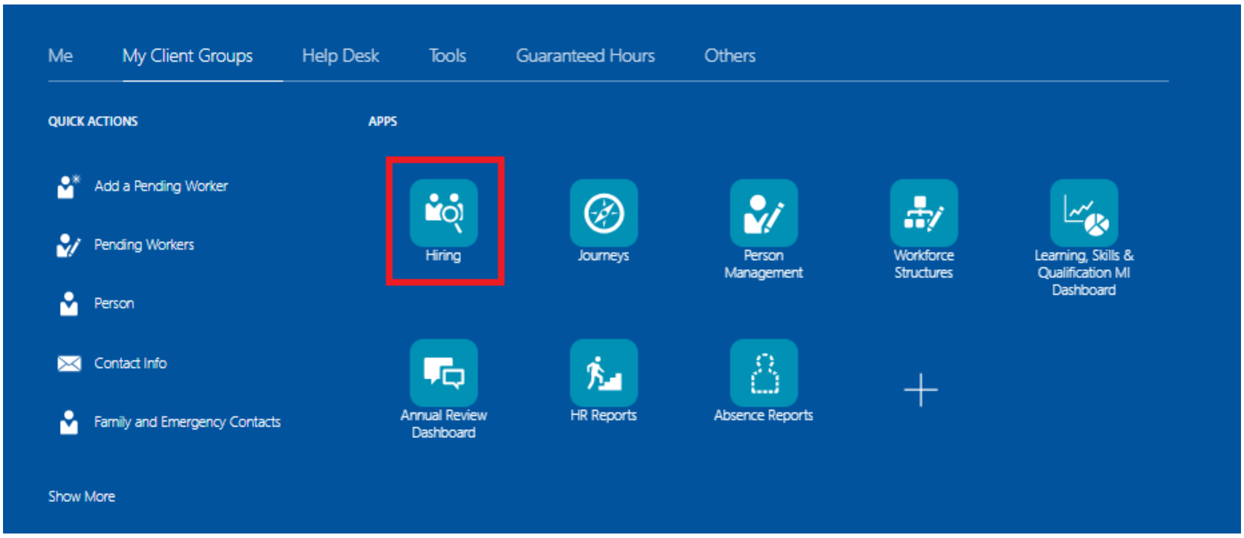


7. The candidates Application status will then be updated and will be viewable by the candidate.

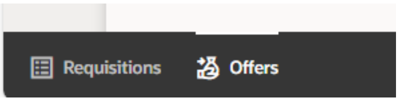
Navigating the Hiring App – Offers

The offers section shows all Job Offers by state (drafted, accepted, withdrawn etc). Please read the separate guide [‘How to create and Manage a Job Offer’]() for full details on how to draft, extend, and manage job offers.

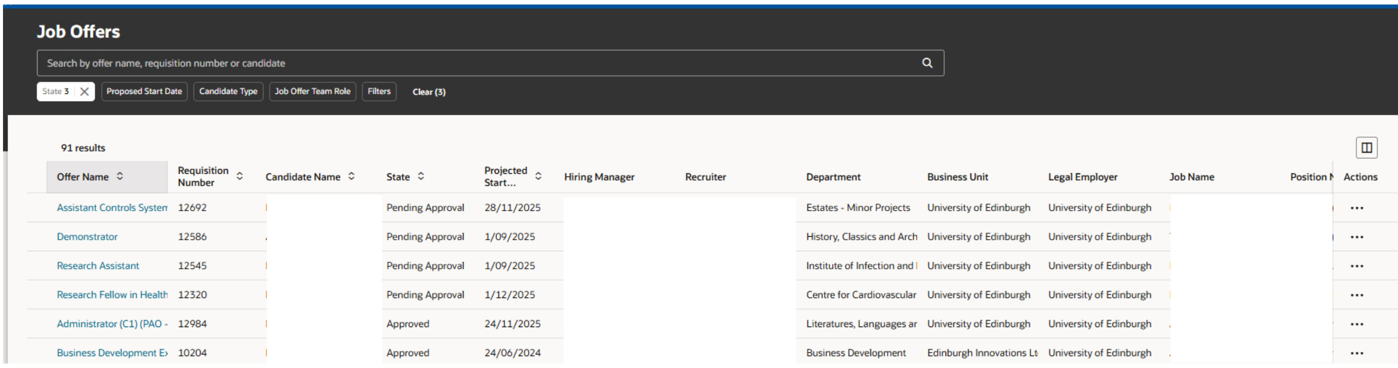
1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then Hiring.



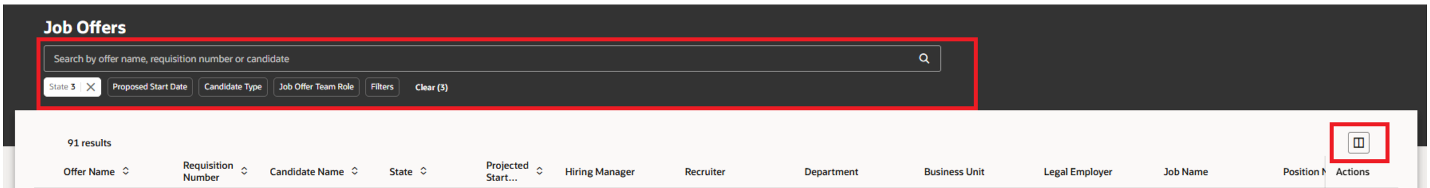
2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. From here, navigate to Offers at the bottom of the page.



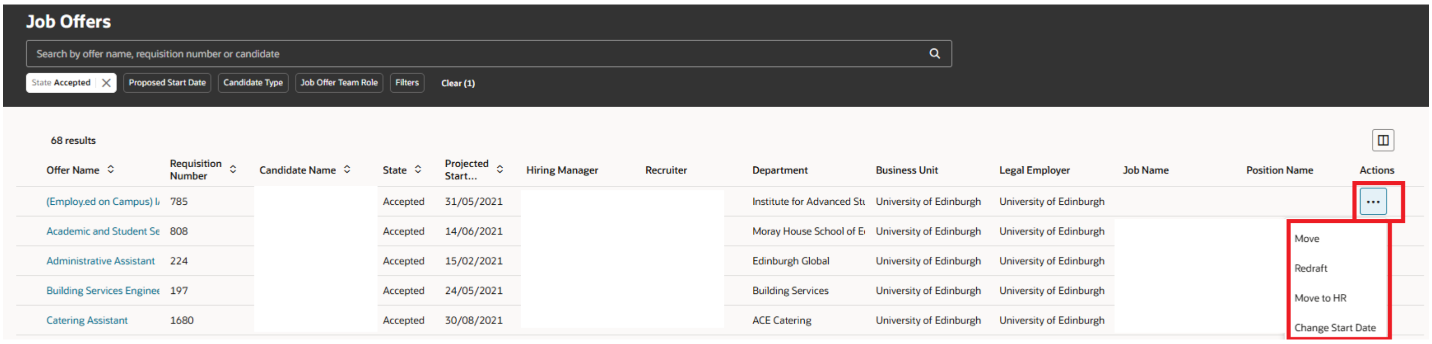
3. The search function and filters at the top of the screen can be used to create a preferred default view. The example below shows a filter using state of pending approval and approved.



4. There are a number of columns of information you can view by using the scroll bar underneath the offer list, you can customise these by clicking on the customise columns icon and then selecting the columns you would like to view. If you can't see all of the columns press Shift + scroll on your mouse to view.



5. **Actions** appear at the end of all the columns as a static field. Click on the ellipsis (3 dots) to take action on the Offers, the action you can take will vary depending on the state of the offer.



Appendix

Appendix 1 – Job Requisition Approval Phases and States

When a job requisition is being created there are a number of phases and states, below highlights these and a short description.

Phase	State	Description
Open	Filled	Candidate has been appointed to job requisition and is moving through recruitment process
	Expired	Job requisition has closed but has not yet been appointed to
	Cancelled	Job requisition was created and advertised, but has been cancelled
	Not Posted	Job requisition was created but advert not yet advertised
	Posted	Job requisitions currently posted on careers site
	Suspended	Job requisition was suspended
	Unposted	Job requisition was opened and posted but advertising has been halted
Approval	Cancelled	Approval process was halted
	Deleted	Requisition was deleted at approval stage
	Pending	Submitted for approval, awaiting response
	Approval Rejected	Rejected by approver
Draft	Deleted	Draft job requisition was deleted
	In Progress	Draft job requisition in progress

Job Formatting	Cancelled	Job requisition was cancelled during job formatting phase
	In Progress	Approved and sent to HR Operations for checking
Posting	Cancelled	Job requisition was posted and cancelled
	In Progress	Job requisition will be posted

Appendix 2 - Recruitment Phases and States

The table below shows each in system recruitment phase (stage in process) and state (step within that stage).

PHASE 1	States	PHASE 2	States	PHASE 3	States	PHASE 4	States	PHASE 5	States
New	To be reviewed	**Screening**	To be reviewed	**Interview**	1st interview to be scheduled	**Offer**	Verbal offer made	**HR**	Pending Automated Processing
	Request Further Information		Reviewed		1st interview scheduled		On hold		Pending Manual Processing
	Further Information requested		Screening to be scheduled		Assessment to be scheduled		To be Created		Error during Processing
	Under consideration		Screening scheduled		Assessment scheduled		Draft		Processing in Progress
	Selected for screening		Screening completed		Awaiting interview/Assessment outcome		Pending Approval		Processed
	Rejected by Employer		Additional assessment to be scheduled		Panel feedback requested		Approval Rejected		Rejected by Employer
	Withdrawn by Candidate		Additional assessment scheduled		Panel feedback received		Approved		Withdrawn by Candidate
			Additional assessment complete		Selected for offer		Extended		
			Progress to interview		Did not attend interview		Accepted		
			On Hold		2nd Interview to be scheduled		In negotiation		
			Selected for offer		2nd Interview scheduled		Rejected by Employer		

			Rejected by Employer		On hold		Withdrawn by Candidate		
			Withdrawn by Candidate		Reserve				
					Rejected by Employer				
					Withdrawn by Candidate				

Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	
1.0	15/12/25	First Version for publication	ME/SK

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.