HIRESERVE

HIRING MANAGER PORTAL

USER GUIDE

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LOGGING IN

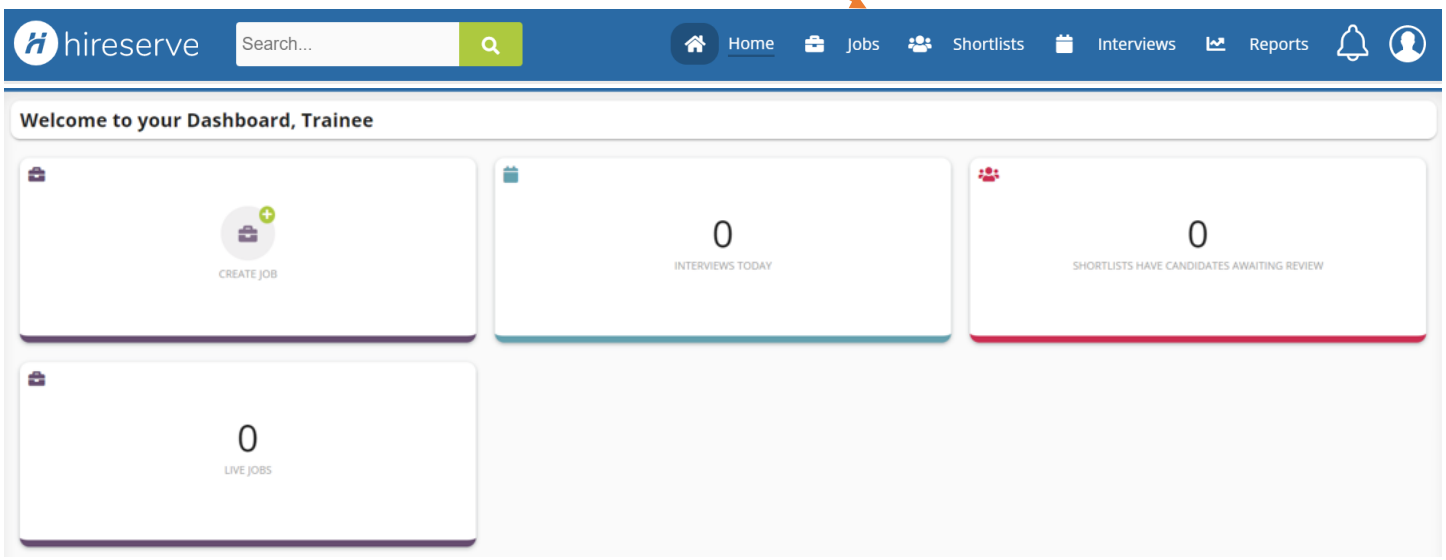
You can access the system by clicking on the link below. We are using Single Sign-On, therefore you will not be required to set up a username or password. *Please note that training is required prior to being granted access to the system*.

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

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

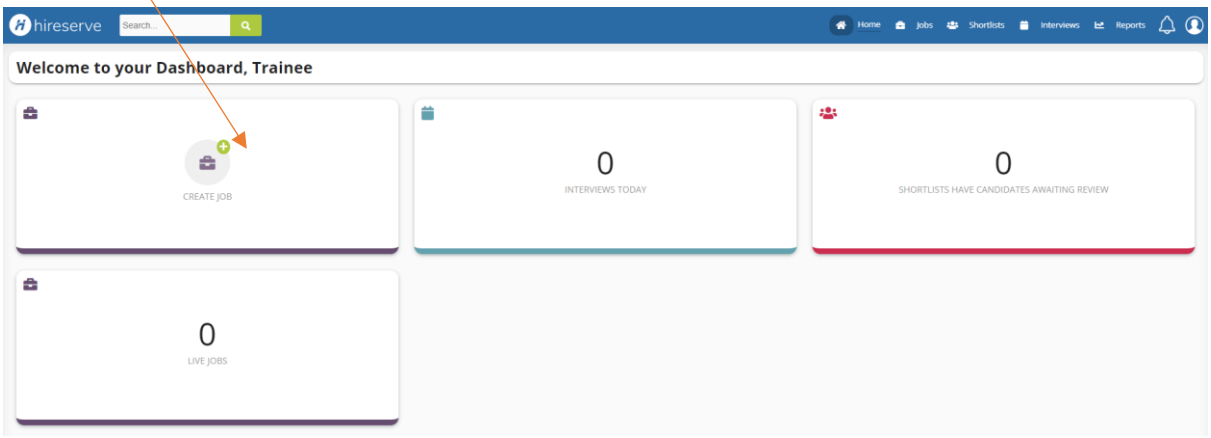
GETTING STARTED

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

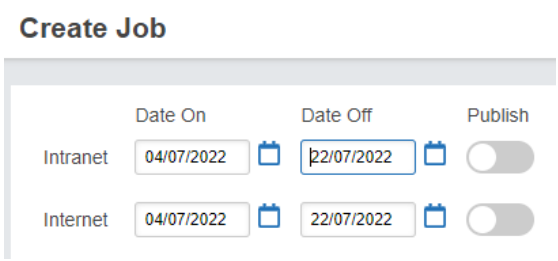


CREATING A JOB

Click on the 'CREATE JOB' tile:



JOB ADVERT DATES



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

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

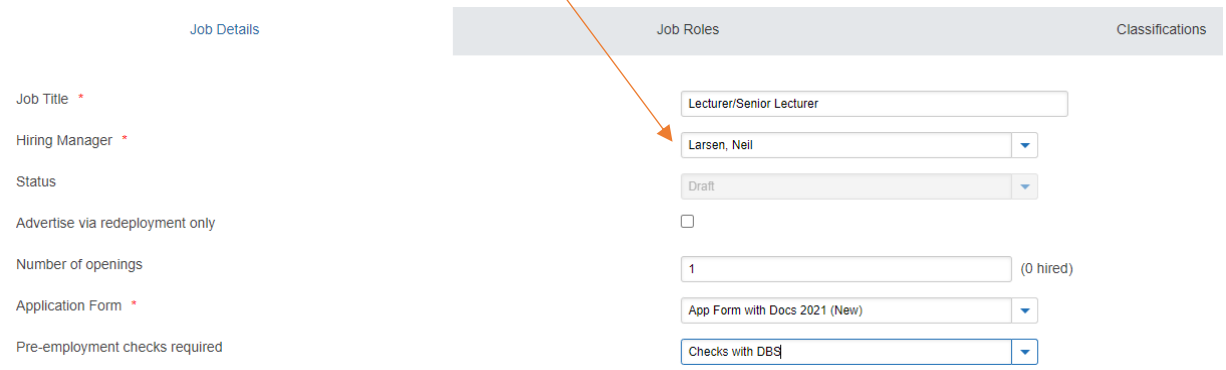
Intranet: *adverts appearing on the Intranet (LJMU Staff Pages) can only be seen by LJMU employees.*

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

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

JOB OVERVIEW

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



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

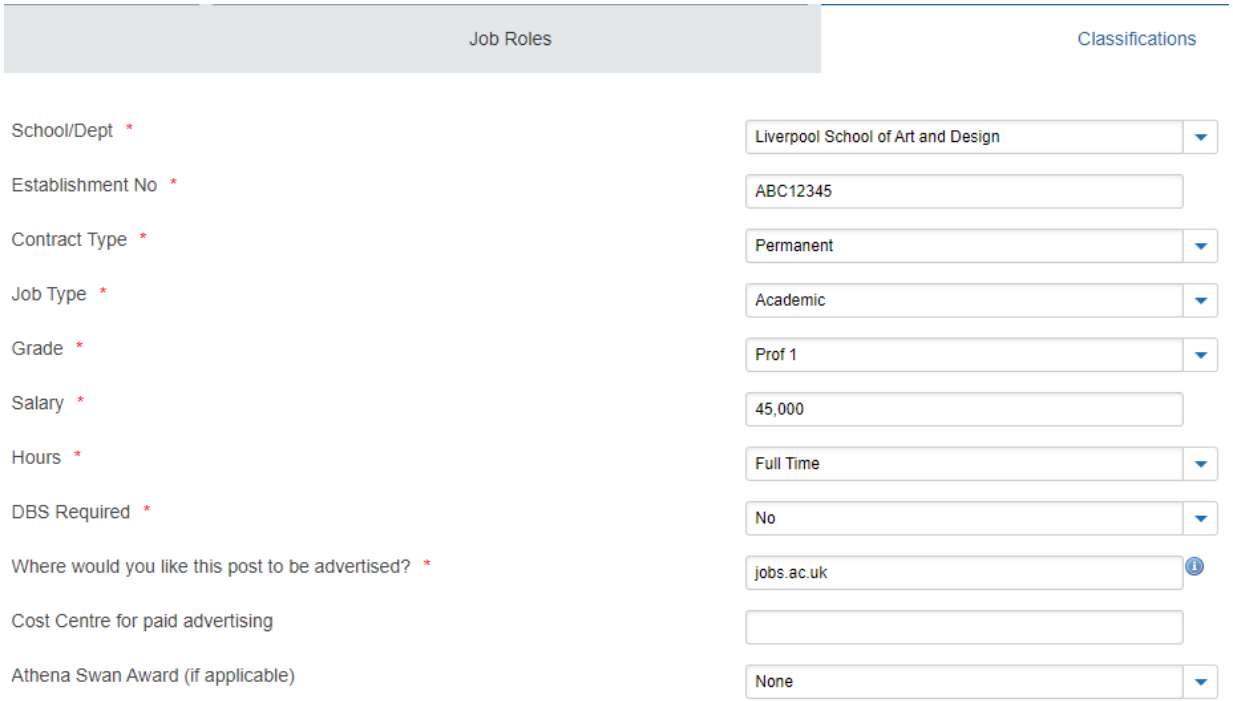
Choose the relevant application form that you would like candidates to use to apply. This could be '**App Form with Docs 2021**' which will allow additional document uploads i.e. CV's or '**App Form No docs**' which will be just an application form to review and no additional uploads permitted. If you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

JOB APPROVERS

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

JOB DETAILS

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

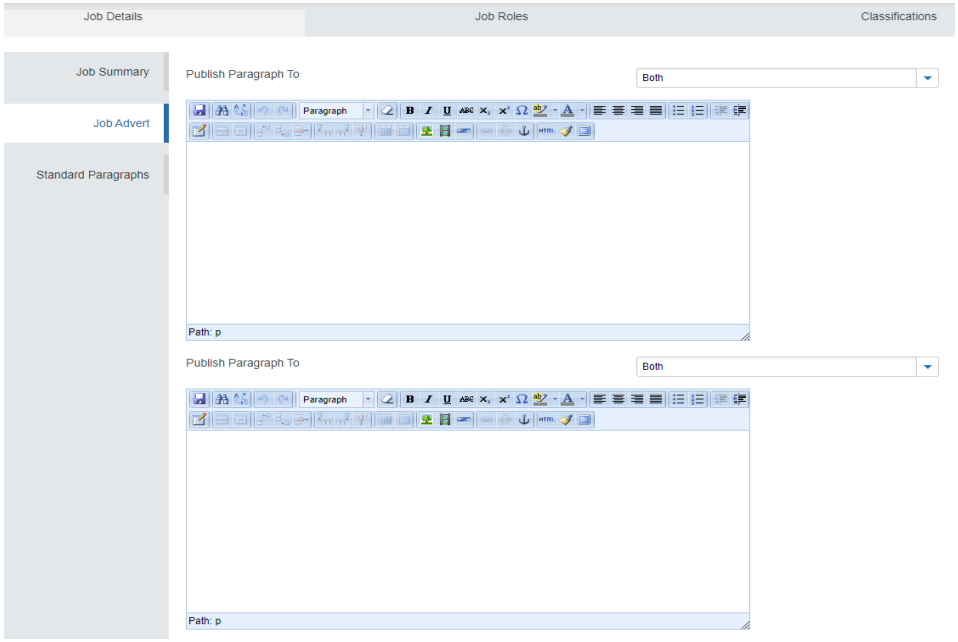


- *For advertising purposes, unless an internally only advert is requested, your adverts will appear automatically on LJMU career pages, 3 x diversity job boards, LinkedIn, Twitter and jobs.ac.uk (if an academic or professional role – research roles are subject to the jobs.ac.uk charge therefore this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

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

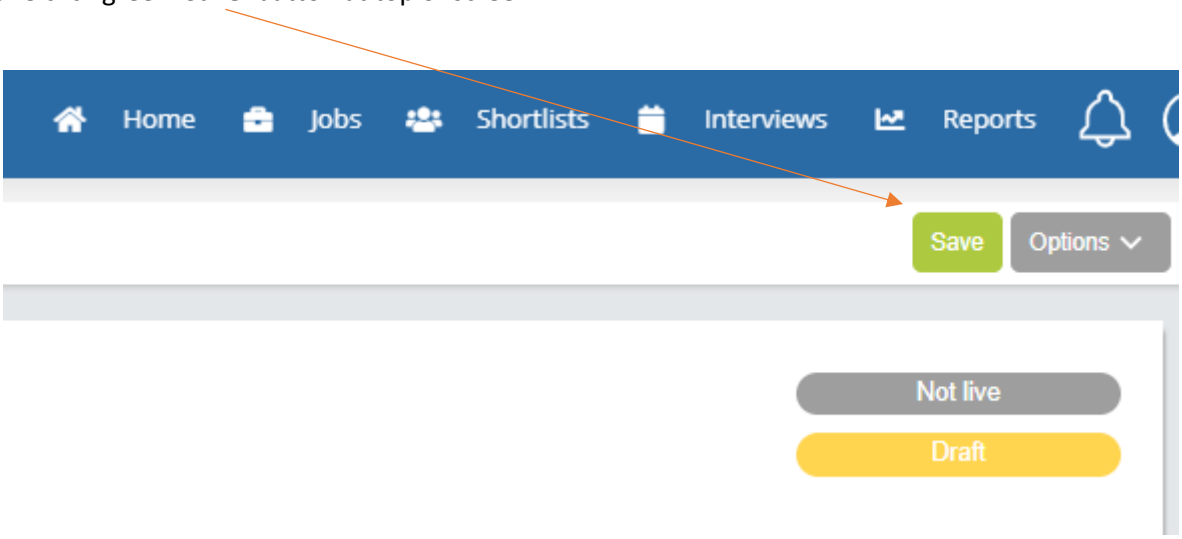
ADDING AN ADVERT

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

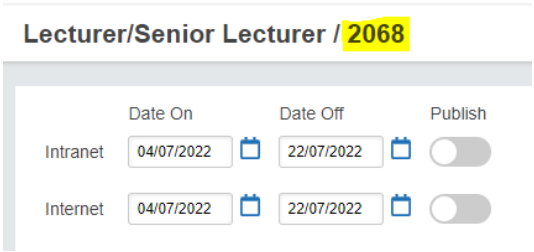


If you would like the same Job Advert details on both internal and external sites just add text into the top '**Publish Paragraph to**' box and leave the drop down as '**Both**', alternatively if you want different wording, you can change each advert box to 'Internet' and 'Intranet' and complete both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

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

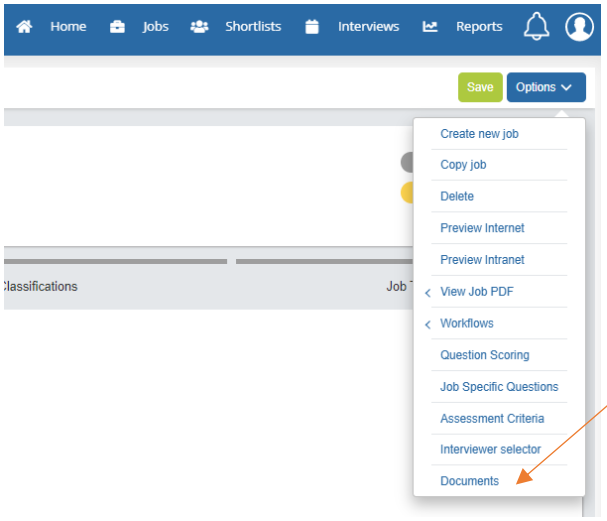


This will then generate your Vacancy Reference Number:



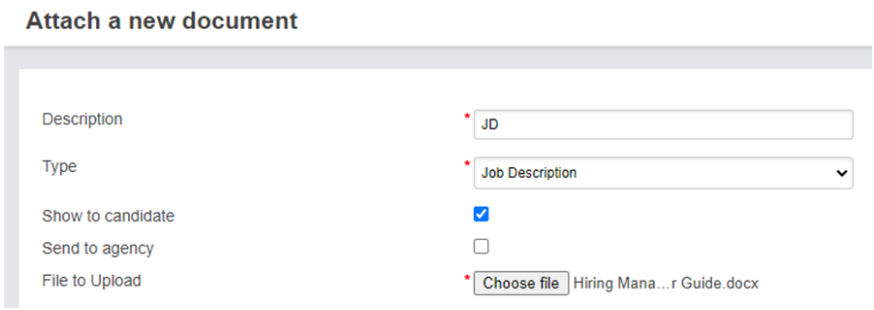
ADDING DOCUMENTS

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



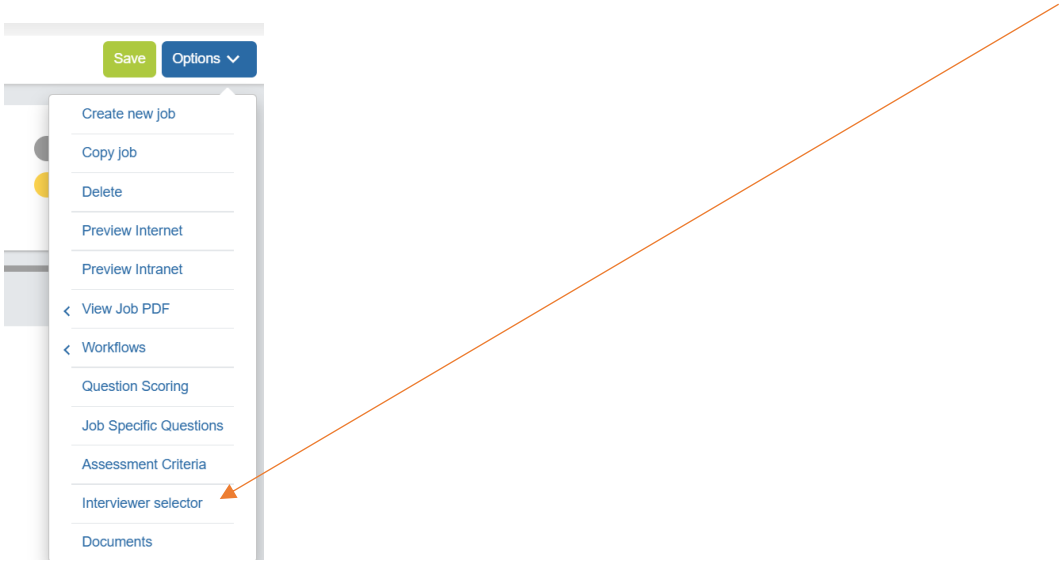
Click '**Add a document**', complete required fields then click '**Choose file**' to browse and select appropriate file, repeat if you need to attach multiple documents. For Job Descriptions, please ensure you attach Word versions rather than PDF in case HR need to edit prior to publishing.

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

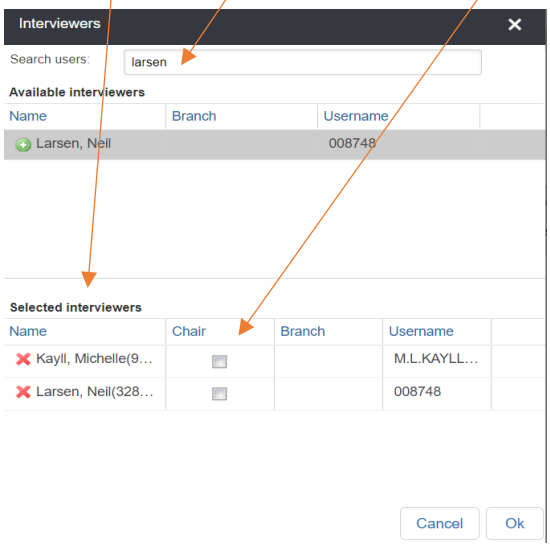


SELECTING INTERVIEW PANEL MEMBERS

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



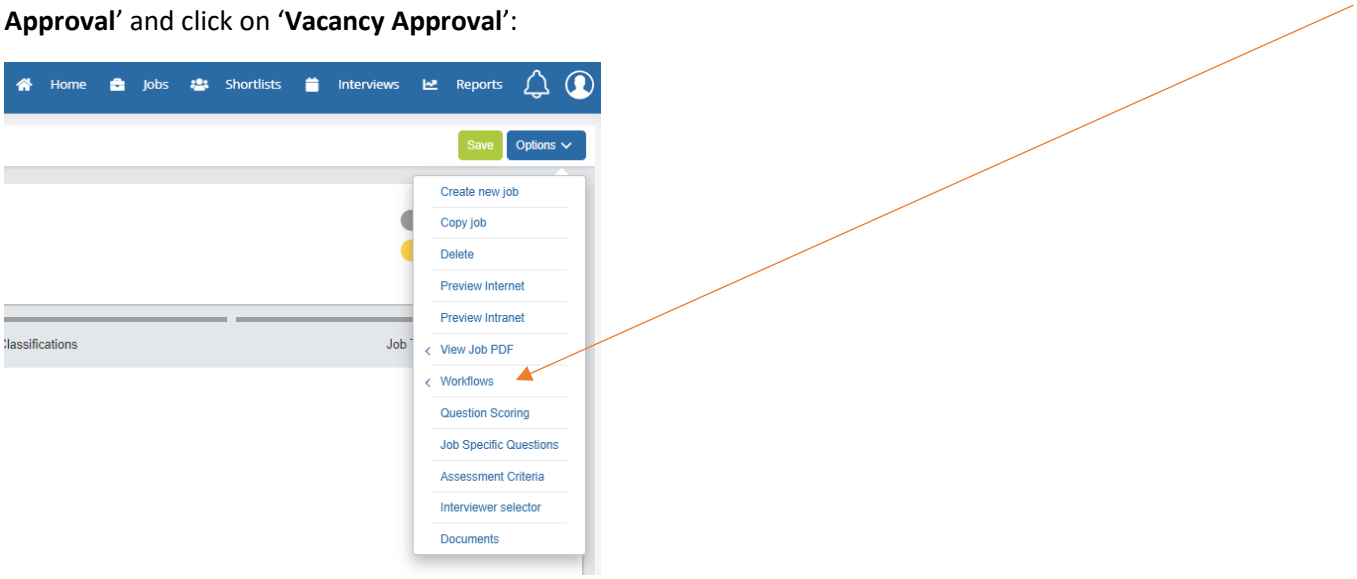
In the Interviewers '**Search users**' box, start typing the surname of the panel member you need and wait a second for the system to find them, once they appear you click the green **+** button to add them, they will then appear in the '**Selected interviewers**' section. If your panel member doesn't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



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

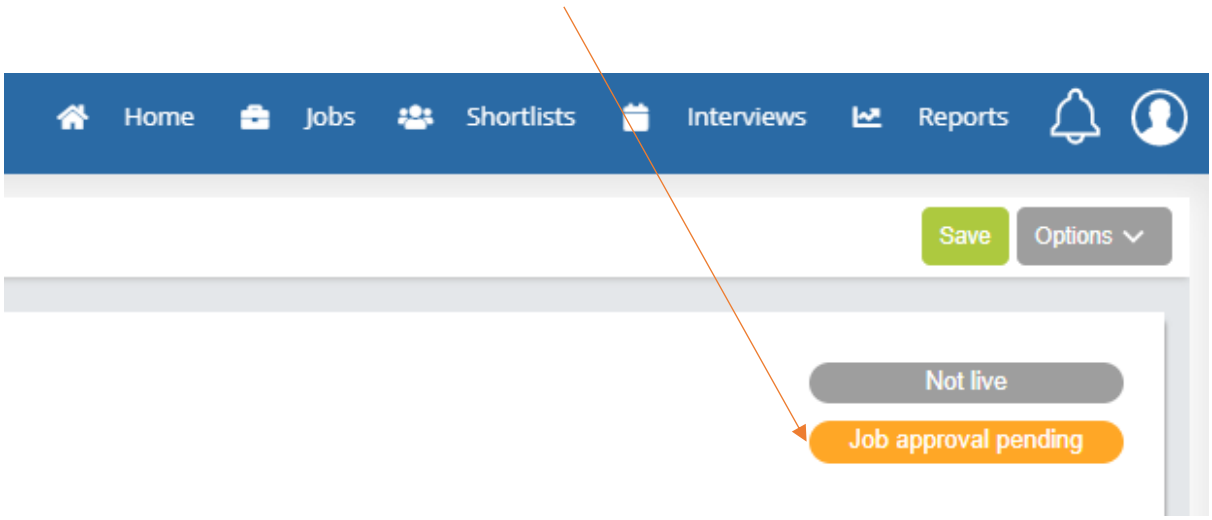
SUBMITTING FOR APPROVAL

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

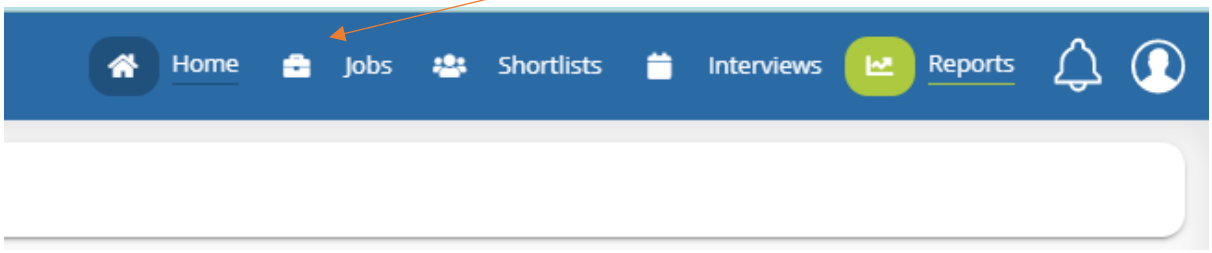


You will be prompted to confirm that you definitely want to do this (so have the chance to go back to amend anything if needed). Once this has been confirmed you will notice that the status of the job has changed to 'Job approval pending'. This approval will then be directed to the Business Partner you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

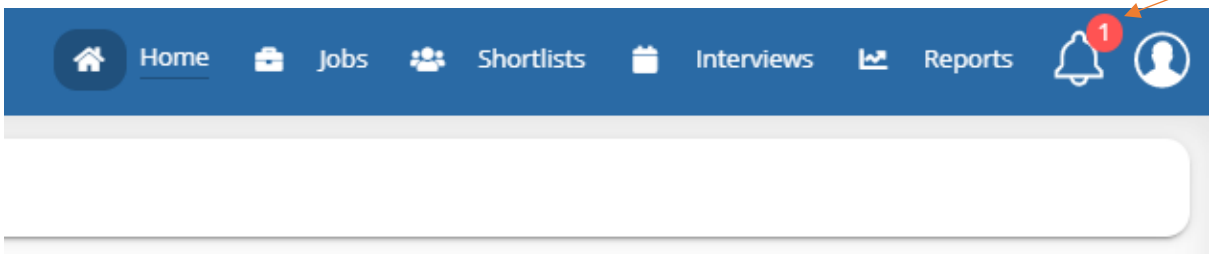
Please note that once you have submitted your job, you won't be able to make any amendments to it as it is in the approval chain and will be reviewed as was originally submitted. If you need to make any changes to the role following submission of the vacancy, please speak to HR.



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



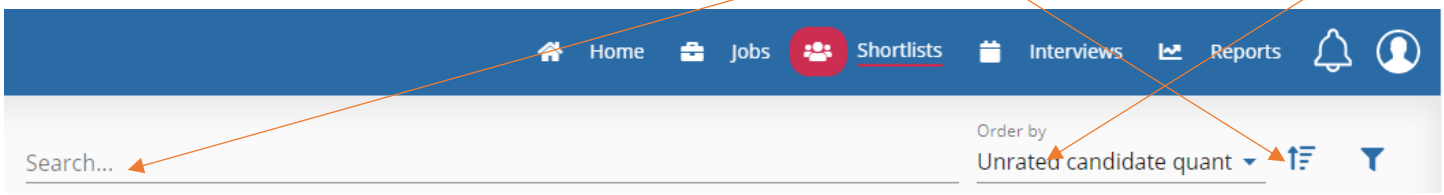
Once the vacancy is approved by HR you will receive a notification in the system, this will show against the 'bell' icon at the top right of your screen. You will also receive an email notification to your inbox.



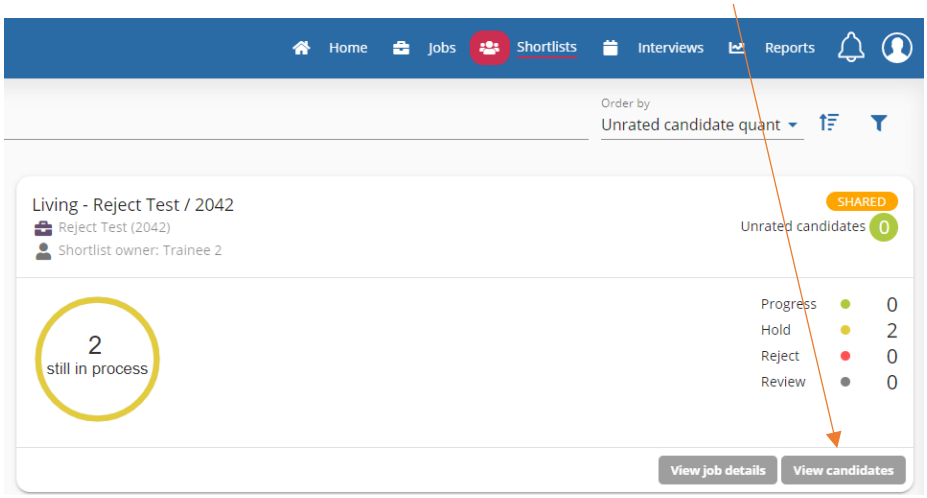
When the vacancy has been published this will show on your dashboard, in the '**MY JOBS**' tile, and the job will also be updated to show as being 'Live' in your 'Jobs' tab.

ASSESSING CANDIDATES

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

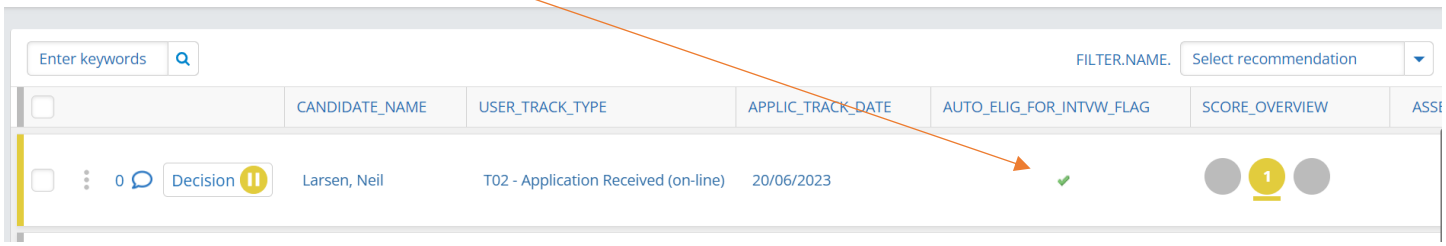


Once you have the vacancy that you need, you can click '**View candidates**'

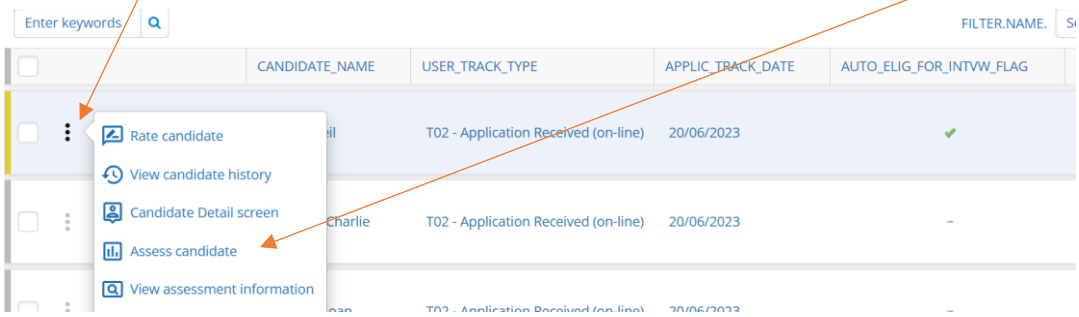


You will now be taken to the 'Candidate Grid' which will show you a list all applications received to date.

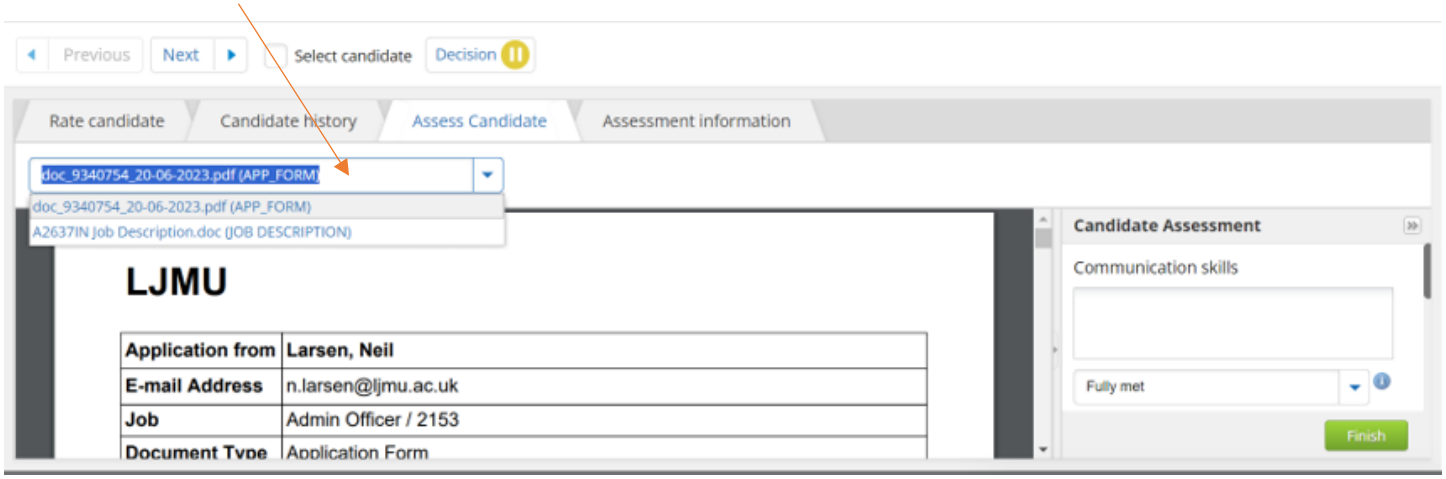
Important: If a candidate has indicated that they have a disability that they wish to be taken into account, a green tick will appear in the 'Disability Confident Flag' column. They must be shortlisted if they meet <u>all</u> of the essential criteria i.e. they cannot be filtered out based on desirable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



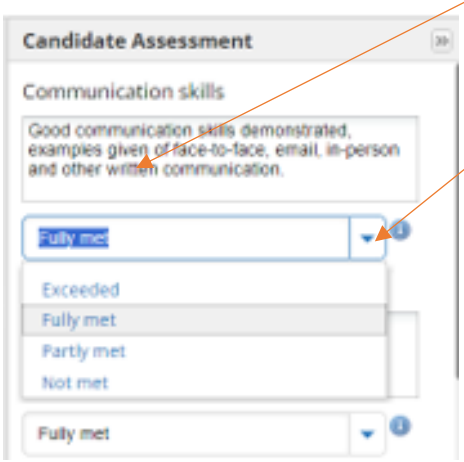
These candidates can now be assessed.
Click the 'three dots' (these may appear to the right of the screen) and choose '**Assess Candidate**' (the 'traffic light' decision system will initially default all applicants to an amber 'pause' status).



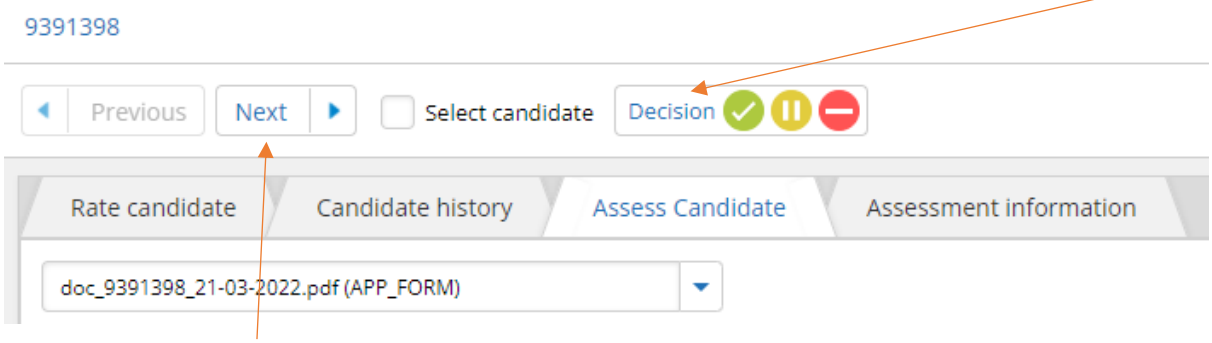
A preview of their application form will appear. **Important: Any additional documents submitted by the candidate will appear in the drop-down box**. The JD for the role will always appear here too so you can refer to it if needed:



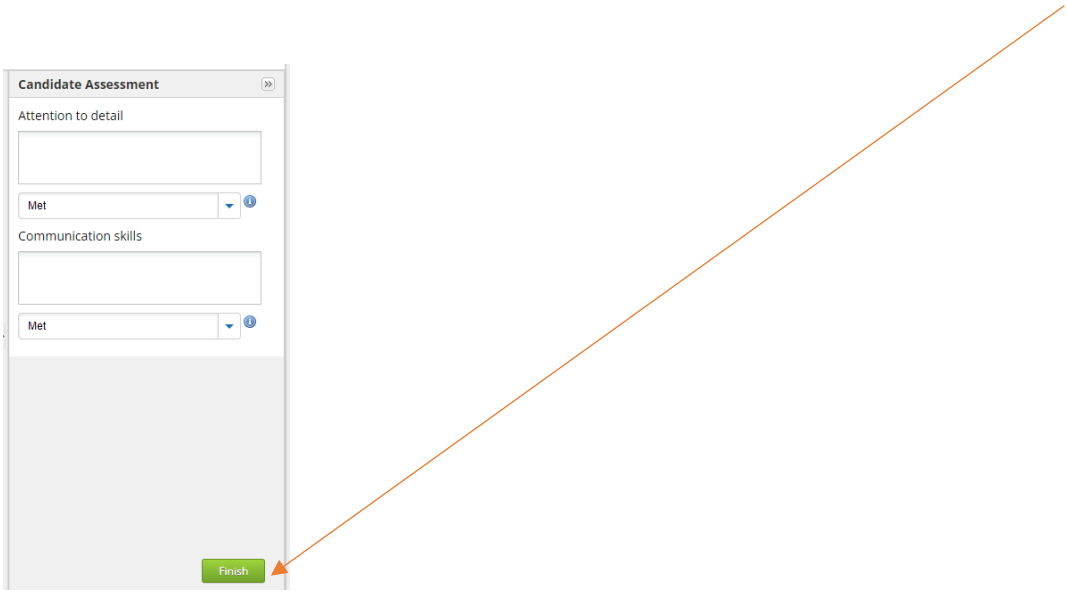
On the right-hand side of the screen, you can carry out an assessment of the candidate against the criteria (which HR will have added at the vacancy approval stage), by adding any notes then choosing the appropriate assessment option from the drop-down lists from options ***Criteria Exceeded, Criteria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



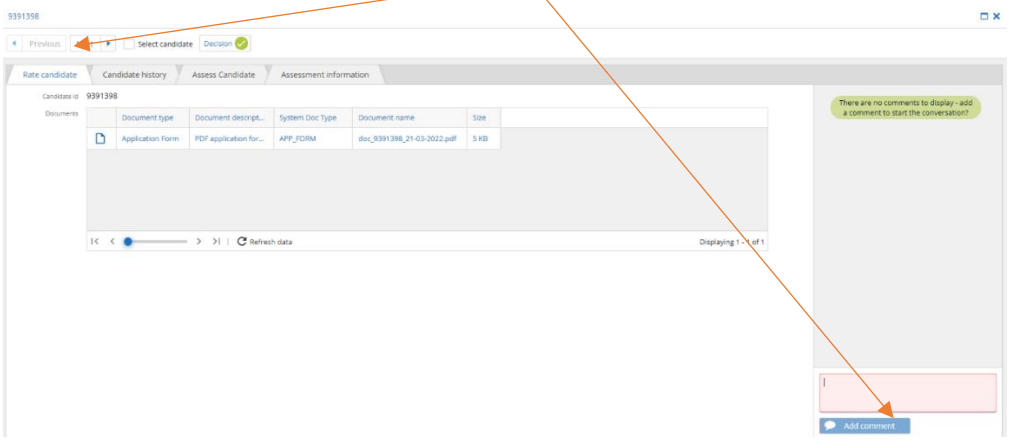
Please be mindful of clicking on '**Save**' regularly at the bottom of the screen to avoid loss of information (a yellow warning triangle will appear if unsaved information has been added) and then make your individual 'Decision' by choosing the appropriate option, **note that this <u>does not</u> progress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



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



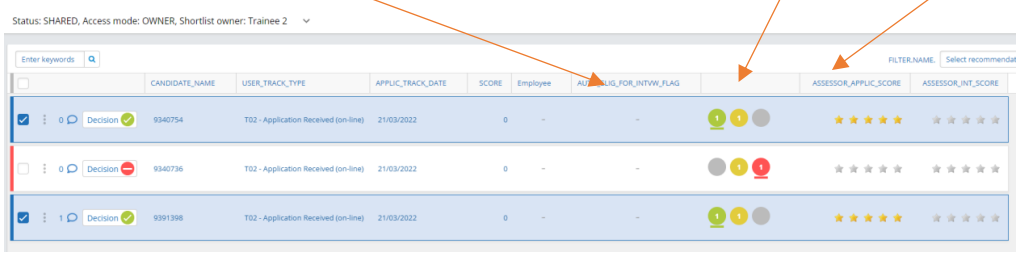
If you click the 'three dots' next to the applicant and choose '**Rate Candidate**' (or select the '**Rate Candidate**' tab), you can also add any notes you wish to in the **Comments** box, then click '**Add comment**', this will be visible to the hiring manager and they can respond (for example if you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



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

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

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

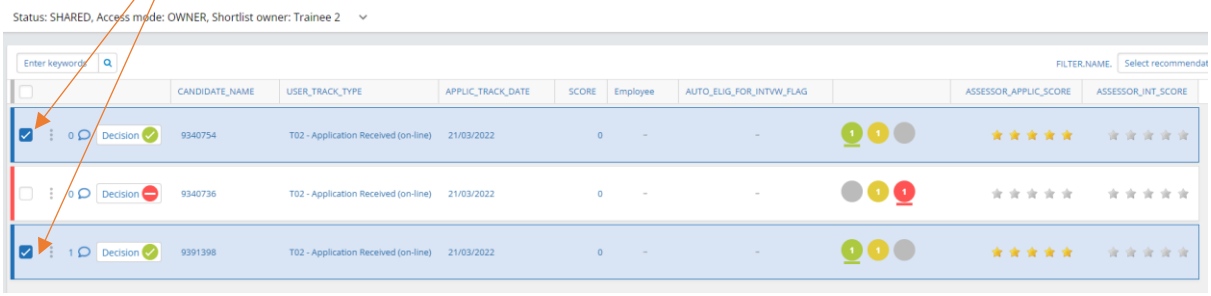


PROCEEDING AND REJECTING CANDIDATES FOLLOWING SHORTLISTING

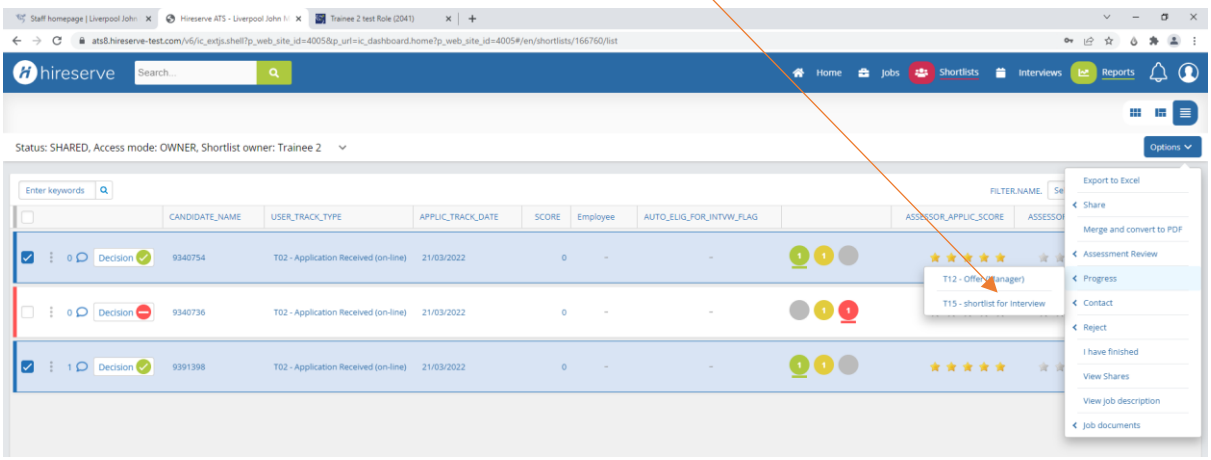
Please note, only the person specified as Hiring Manager in the system can proceed and reject candidates in the system and this should only be done once the advert has closed for applications.

Progressing Shortlisted Candidates

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



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

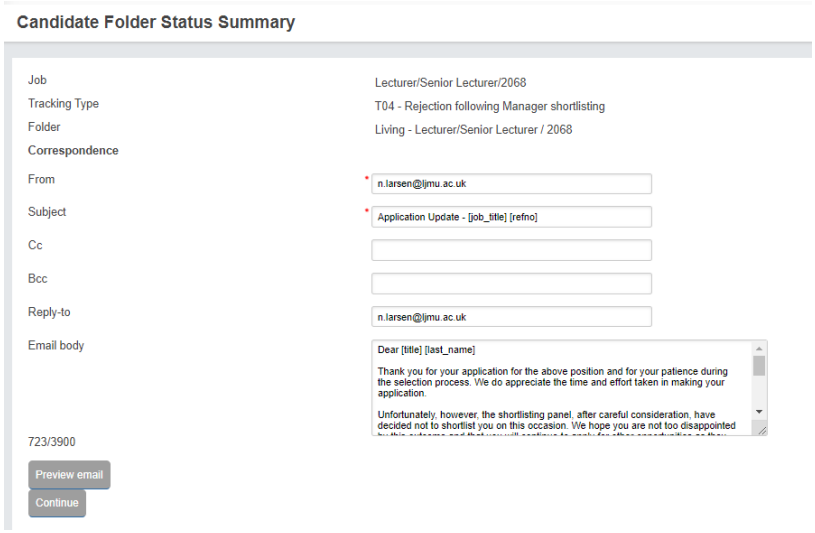


Rejecting Unsuccessful Applicants

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

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

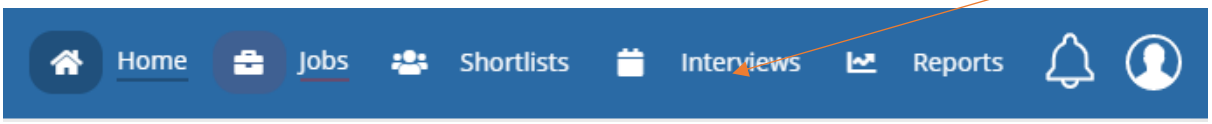
The emails will come from the logged in user and be set to reply to the same person by default (unless a customised email which will be sent from HR). This is a free text field and can be changed to any email address(es) you would like:



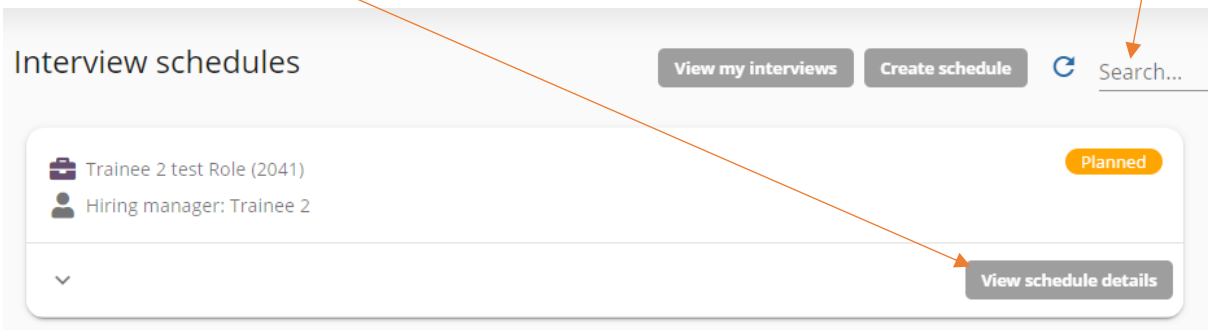
Back in the candidate folder, you will notice that rejected candidates' statuses will have now changed. You can hide them by clicking on the checkbox at the top right hand of the screen that says '**Live Candidates**'

CREATING AN INTERVIEW SCHEDULE

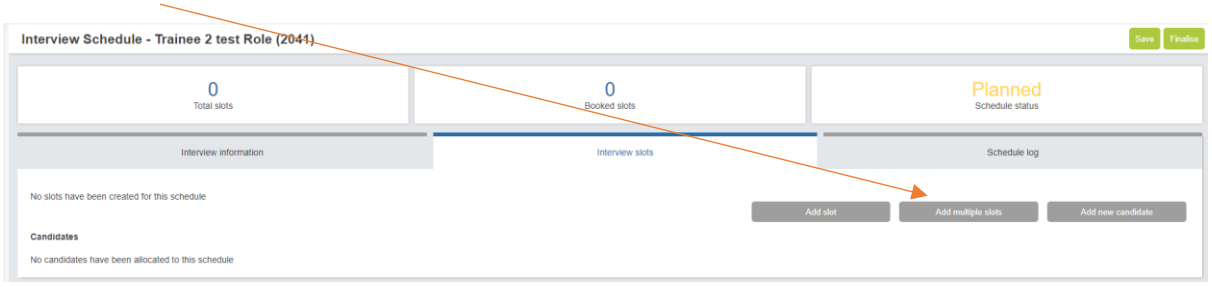
You will now need to define your interview schedule to progress your shortlisted candiates. Click on the '**Interviews**' tab and choose '**View all my schedules**' – a template schedule will have automatically created for your role:



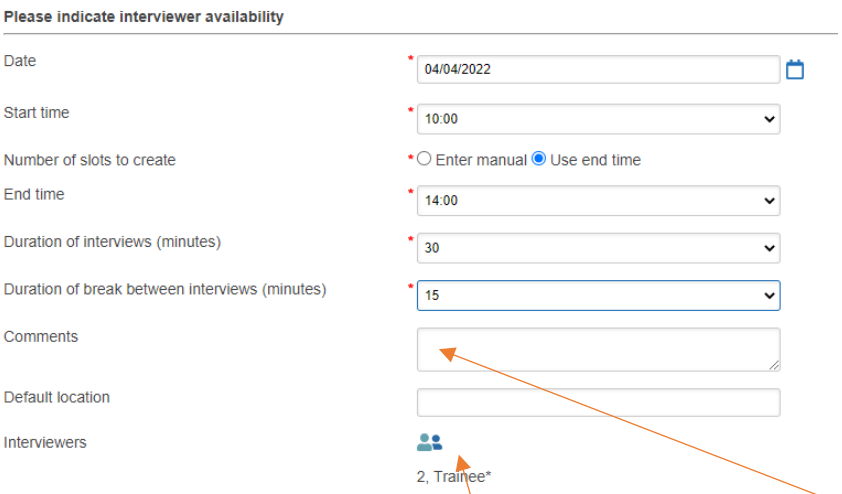
Click '**View schedule details**' for the appropriate job (if you have multiple vacancies, you can use the '**Search**' box to find the relevant one by inputting either the vacancy reference number or job title):



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



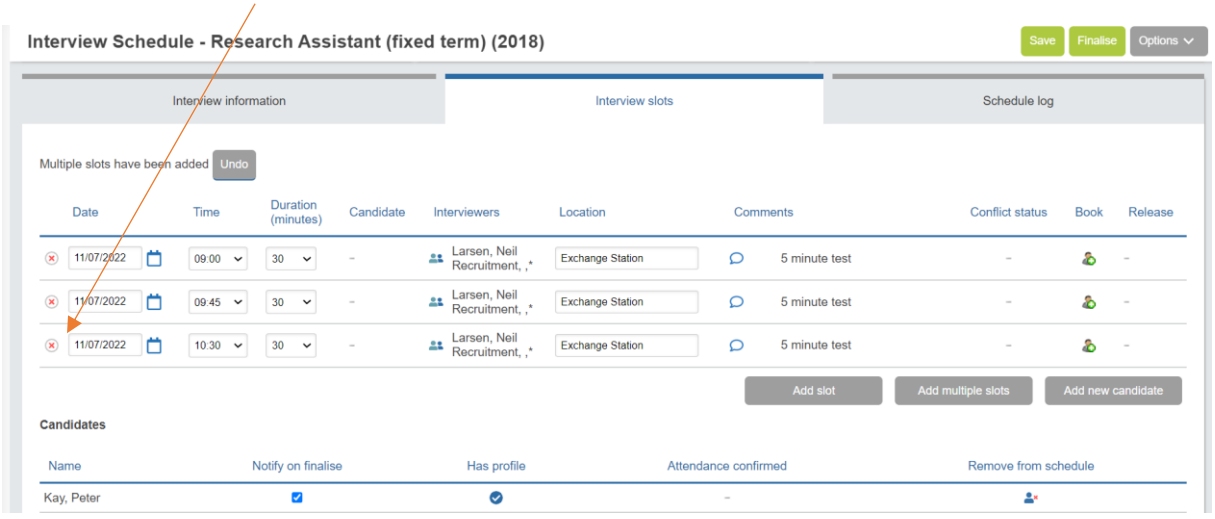
You can now enter details of the interviews schedule by populating the fields that appear:



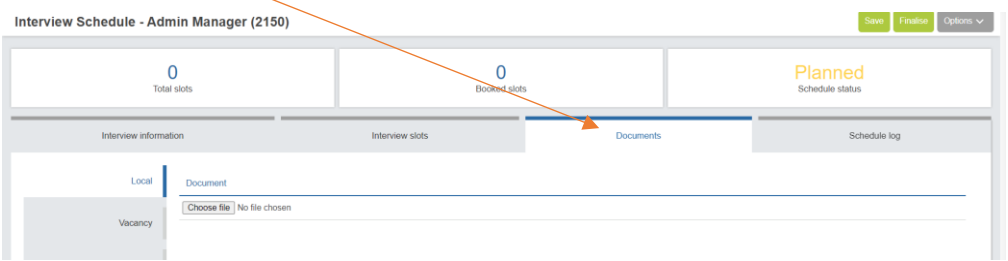
If candidates are required to deliver a presentation and/or undertake additional assessment then you can enter details of this, (plus any other relevant details such as where to report on arrival) in the 'Comments' box, and also select a default location for the interviews from the drop-down list if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

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

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

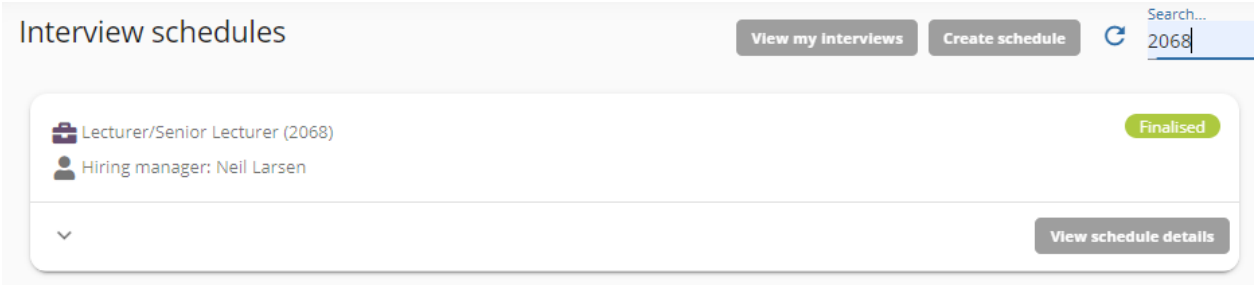


You can also upload any supporting documentation that candidates might need i.e. test instructions or case study by clicking on the '**Documents**' tab and browsing for the document:

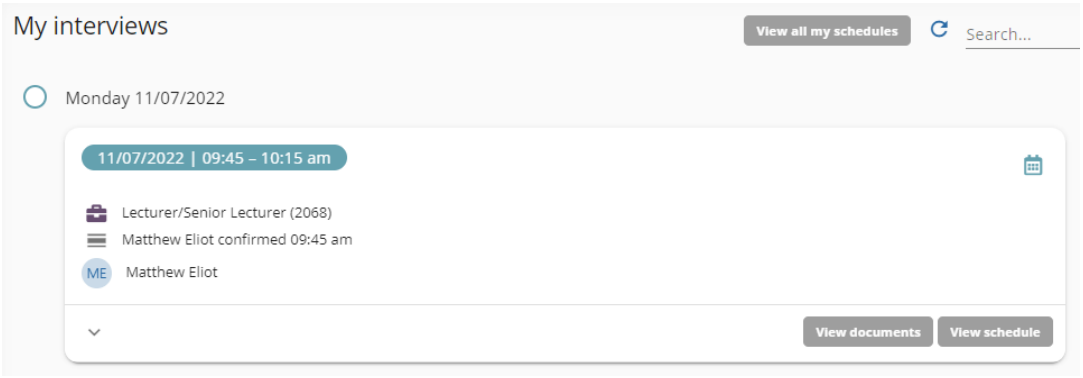


You will be presented with a note asking you to confirm that you wish to finalise the interviews and send a confirmation email to shortlisted candidates.

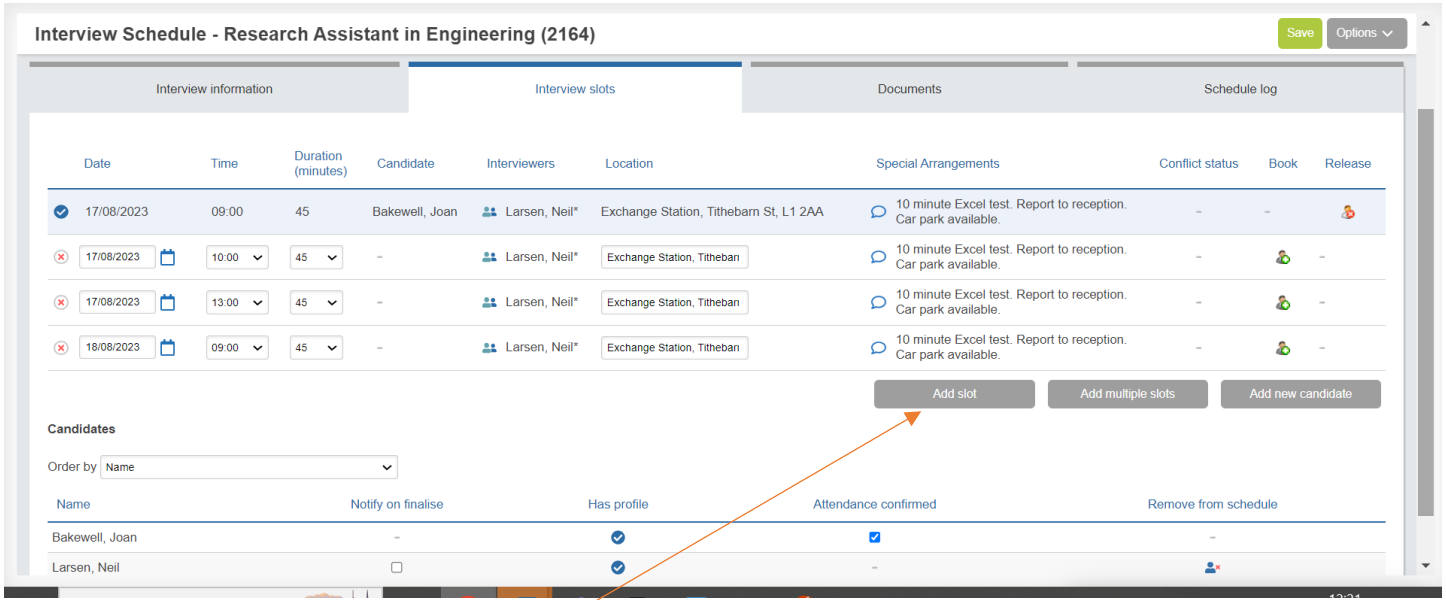
You will then be taken the preview email page which will show you the email to be sent to candidates asking them to log into their portal to select a convenient interview slot. You don't need to edit this email as all the information you entered when setting up the schedule will be available to the candidate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



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



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



Amending an interview schedule

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

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

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

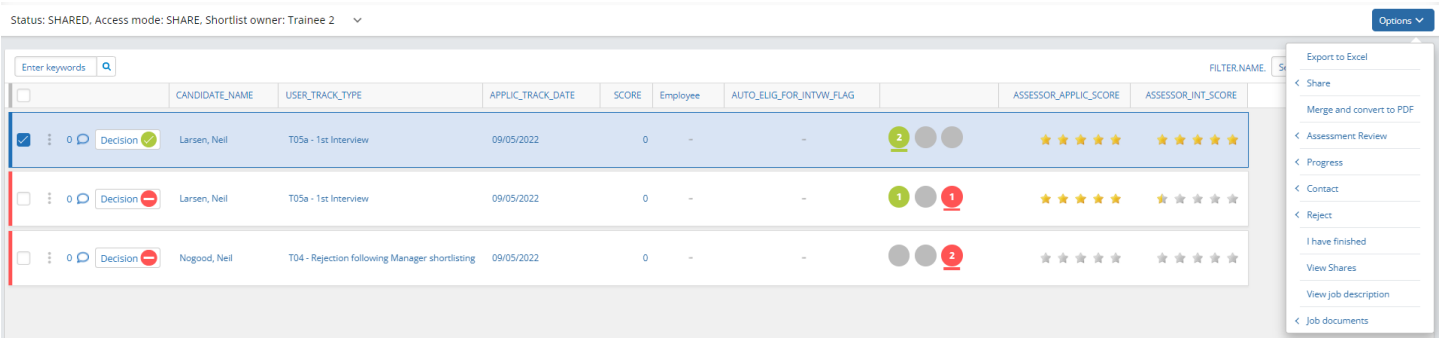
PROCEEDING AND REJECTING CANDIDATES FOLLOWING INTERVIEW

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

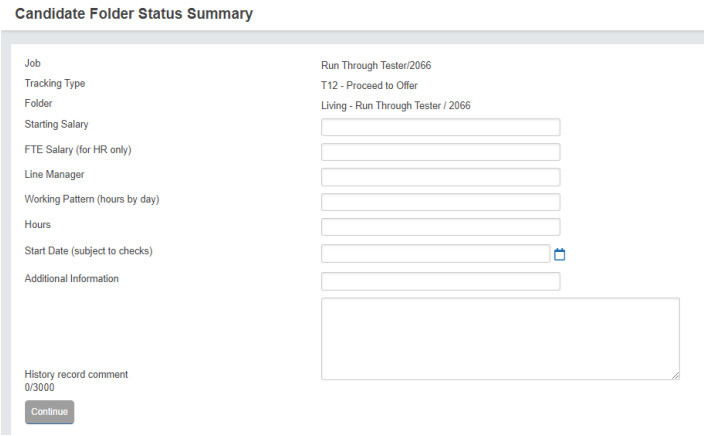
You are now able to proceed or reject candidates from this screen (if taking these actions from your dashboard, you can get to the candidate folder by selecting '**Jobs**' then in the tile for the relevant job, selecting '**View Candidates**'.

Making an offer to successful candidate(s)

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



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



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

Contacting/closing down unsuccessful candidates following interview

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

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

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

NEXT STEPS

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

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

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