



# Recruitment



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## **Statement of Objectives:**

The PSP / Jane Systems Recruitment module provides you with a means of:

Aligning your Recruitment activity centrally with other core HR processes within the Windows Application.

Automating your Recruitment Process; removing paperwork and manual processes.

Managing Vacancies and Candidates more effectively.

Getting jobs to market quickly, with real time links to your website and third-party job sites.

Ensuring that job applicants provide the information that matters to you as an employer.

Maintaining an automated, auditable record of recruitment activity, keeping applicants and colleagues informed at every stage.

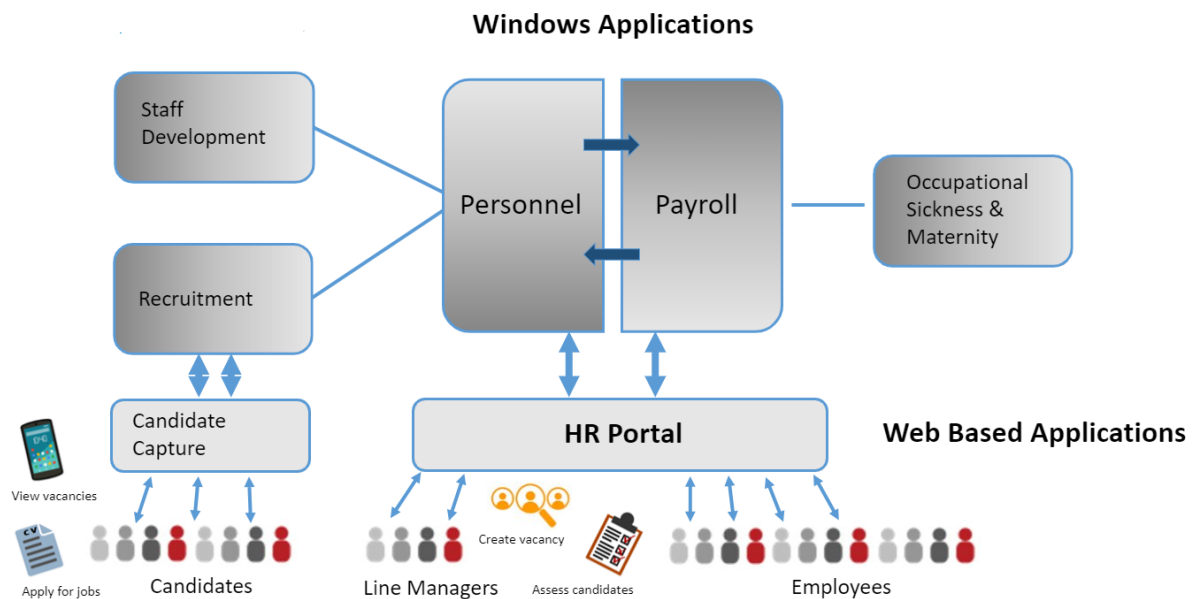
## Recruitment - High Level Overview

The Recruitment process consists of 3 core components.

1. HR Portal
2. Windows Application
3. I Frame (Vacancy Creation & Candidate Capture)

The below diagram shows the Recruitment process interacting with the wider PSP / Jane infrastructure and HR components.

The module is supported by Workflow Automation.

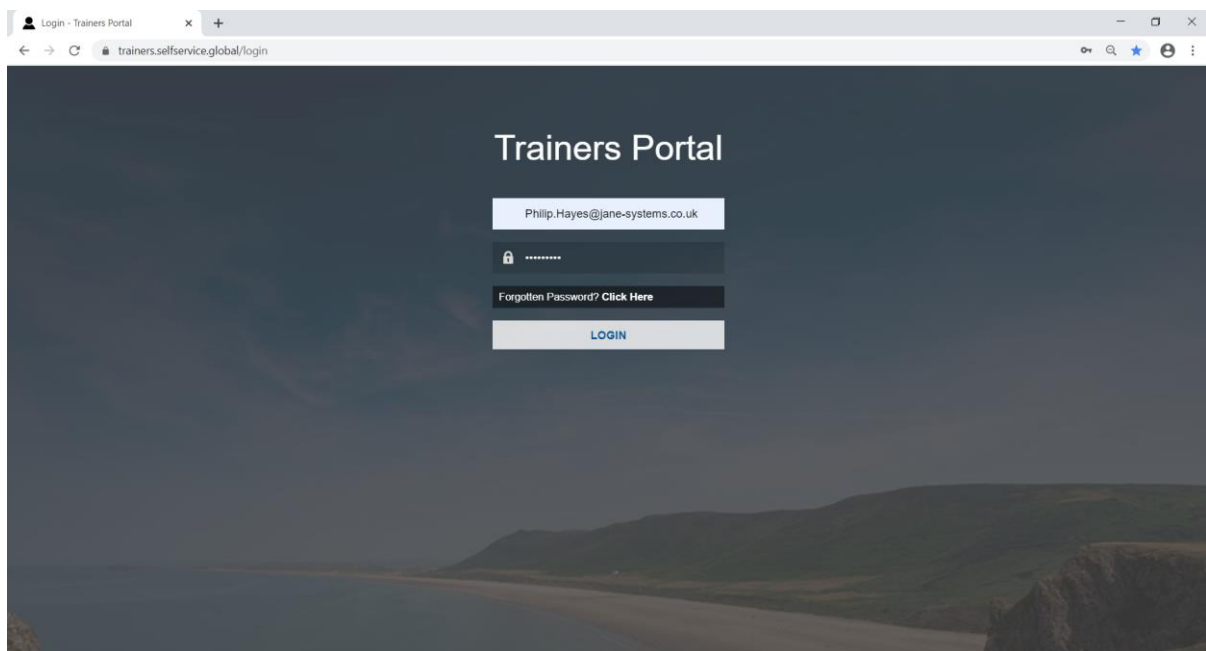


## HR Portal – Logging On

Log into the Portal with your standard credentials.

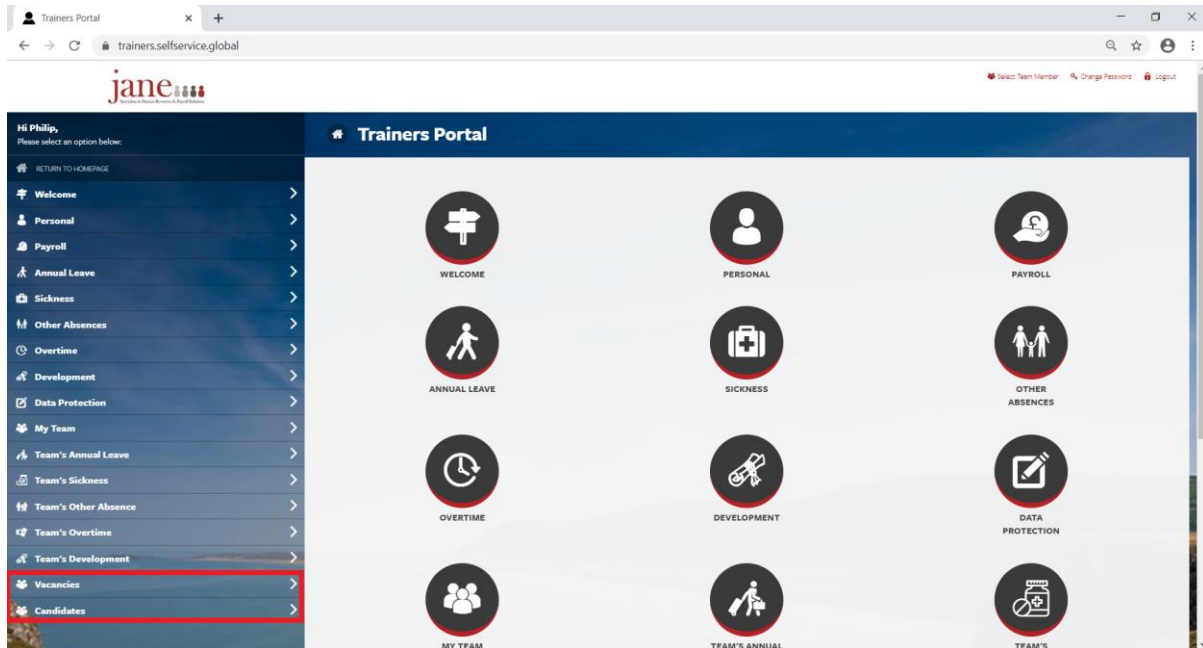
To log in to the Portal, users require an Email address and a password.

Forgotten Passwords can be managed form here using the link provided.



## HR Portal - Recruitment

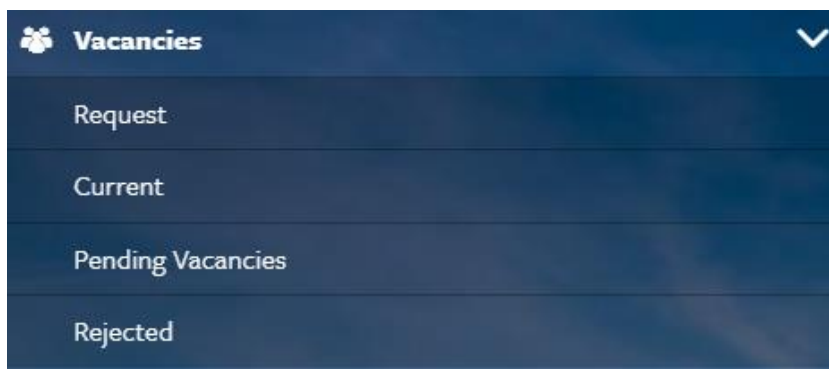
The Recruitment module in the Self Service Portal consists of 2 components – **Vacancies** and **Candidates**, shown here at the bottom left hand side of the menu options.



## HR Portal – Vacancies

There are 4 sub-functions within the Vacancies functionality, these are:

1. Request
2. Current
3. Pending Vacancies
4. Rejected





## Vacancies – Request

Line Managers or Internal Recruiters can request a new Vacancy by launching and completing the Request Form.

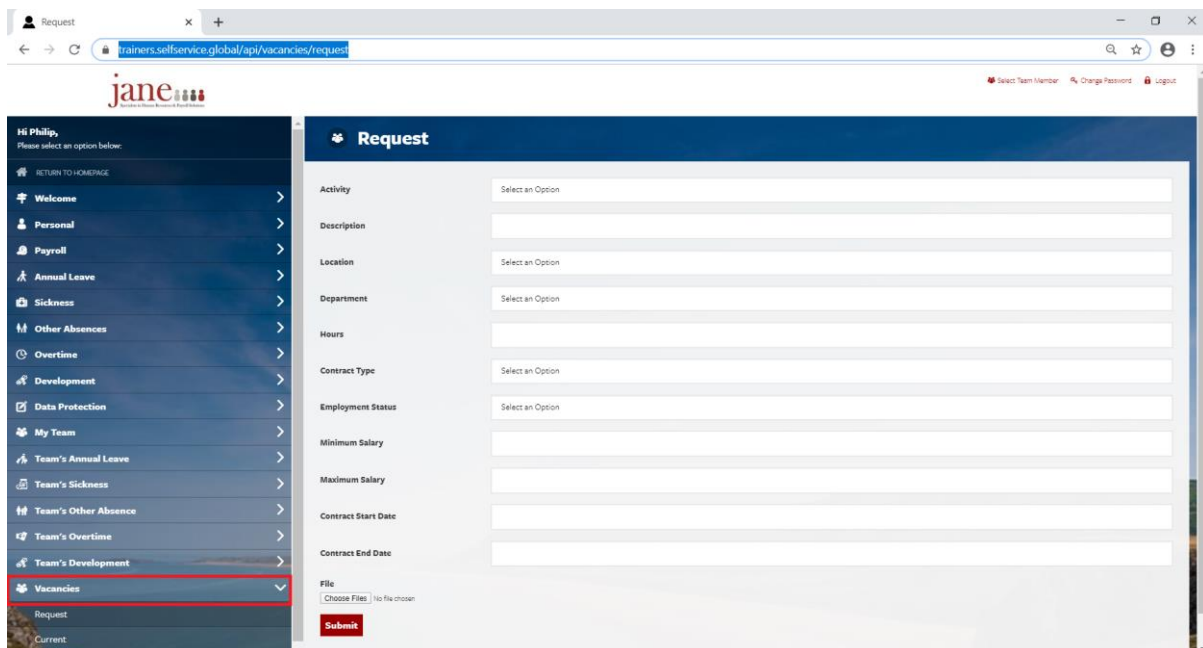
The drop-down menus and free format text boxes are completed to build the Vacancy. The details here will appear on the I Frame (job advert and candidate capture mechanism).

Fields with drop-down options such as Activity are harmonized with the configuration of the Windows Application.

Please note, the fields shown below on the Request form can be changed if required.

Files can also be uploaded and attached to the Request form using the **Choose Files** functionality.

Click **Submit** once all the details have been added.

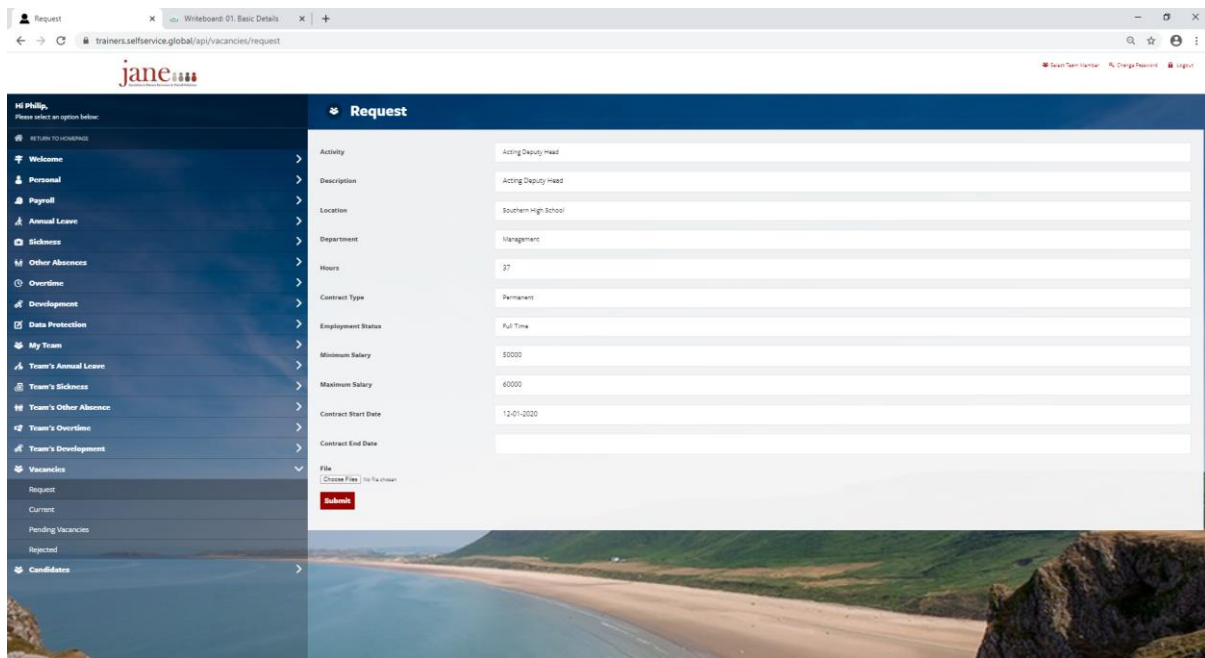


The screenshot shows a web browser window with the URL `trainers.selfservice.global/api/vacancies/request`. The page title is "Request". On the left is a navigation menu with the "Vacancies" option highlighted in red. The main content area is a form titled "Request" with the following fields:

- Activity: Select an Option
- Description: [Text Input]
- Location: Select an Option
- Department: Select an Option
- Hours: [Text Input]
- Contract Type: Select an Option
- Employment Status: Select an Option
- Minimum Salary: [Text Input]
- Maximum Salary: [Text Input]
- Contract Start Date: [Text Input]
- Contract End Date: [Text Input]
- File: Choose Files | No file chosen

A red "Submit" button is located at the bottom of the form.

## Example of fully completed Vacancy form.



**Request**

Activity: Acting Deputy Head

Description: Acting Deputy Head

Location: Southern High School

Department: Management

Hours: 37

Contract Type: Permanent

Employment Status: Full Time

Minimum Salary: 50000

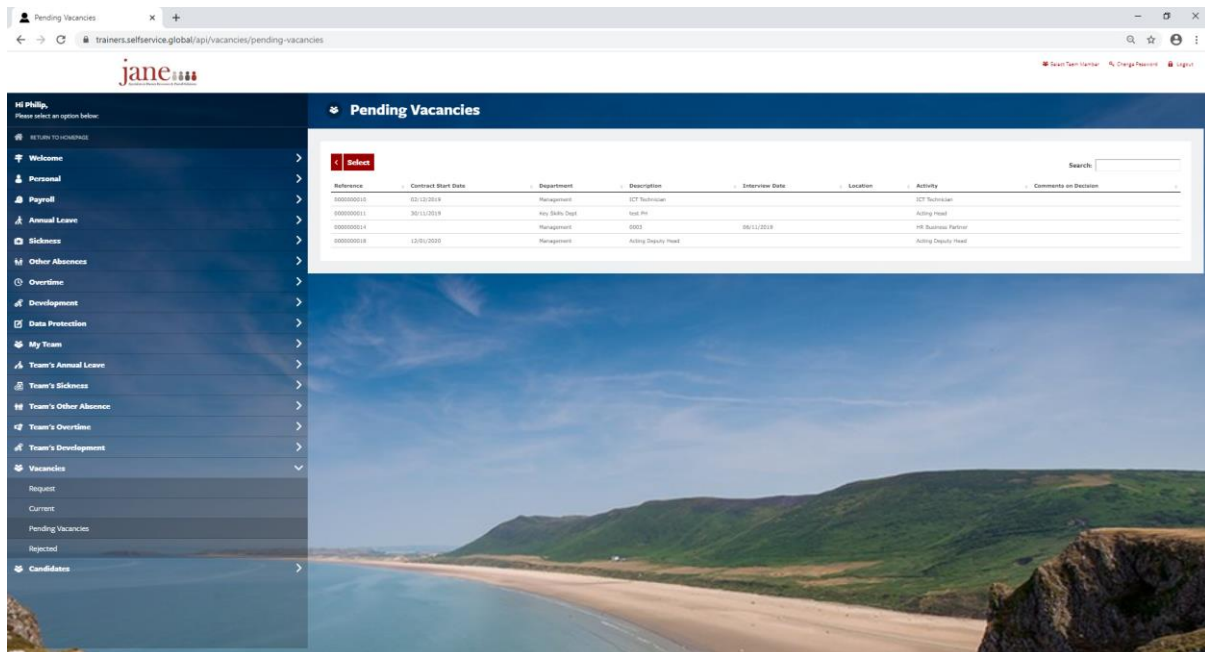
Maximum Salary: 60000

Contract Start Date: 12-01-2020

Contract End Date:

File:

After clicking **Submit**, the Vacancy moves to the **Pending Vacancies** queue, pending approval. This will require approval in the Windows Application by the HR Team.



**Pending Vacancies**

Search:

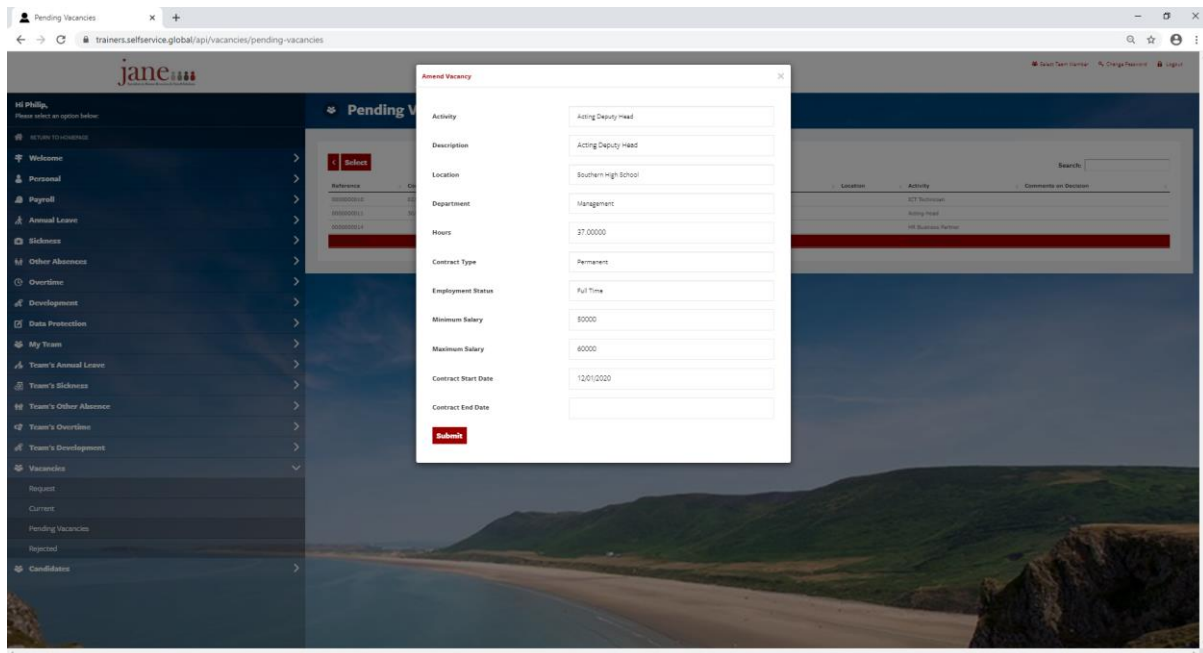
| Reference | Contract Start Date | Department     | Description        | Interview Date | Location | Activity            | Comments on Decision |
|-----------|---------------------|----------------|--------------------|----------------|----------|---------------------|----------------------|
| 000000000 | 03/12/2018          | Management     | ICT Technician     |                |          | ICT Technician      |                      |
| 000000011 | 30/11/2018          | HS Skills Team | Head PE            |                |          | Acting Head         |                      |
| 000000014 |                     | Management     | 0003               | 06/11/2018     |          | HR Business Partner |                      |
| 000000018 | 12/01/2020          | Management     | Acting Deputy Head |                |          | Acting Deputy Head  |                      |

## Vacancies – Pending Vacancies

Select the Vacancy row to display the underlying details.

The Vacancy details can be amended at this point through the **Amend Vacancy** Pop-up window.

Click **Submit** to apply any final amendments.



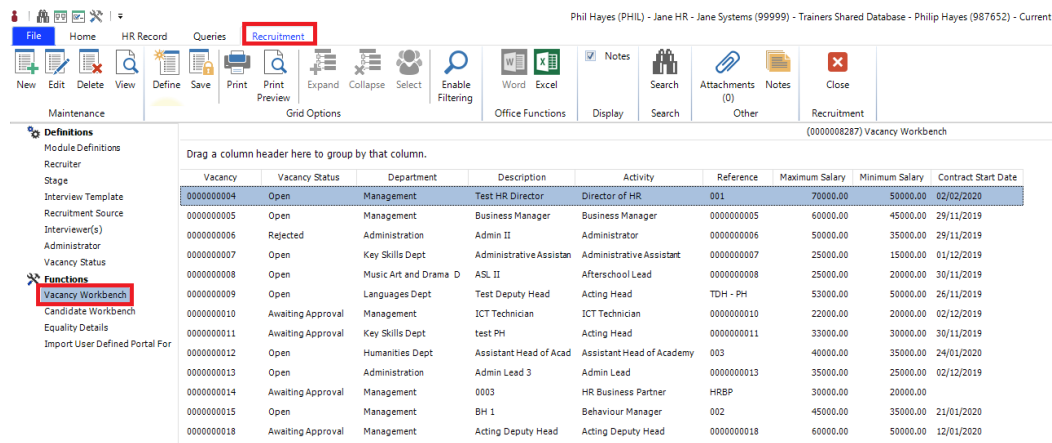
The next stage from here is for the HR Team to review and approve the Vacancy request in the **HR Application > Recruitment > Vacancy Workbench**.

## HR Application – Vacancy Workbench

### HR Application > Recruitment > Vacancy Workbench

The Vacancy request from the Portal will feed directly into the Vacancy Workbench and will automatically be set to status **Awaiting Approval**. The Vacancy is now available for review by the HR Team.

The Vacancy Workbench provides the HR Team with a real time snapshot and inventory of all Vacancies.



Phil Hayes (PHIL) - Jane HR - Jane Systems (99999) - Trainers Shared Database - Philip Hayes (987652) - Current

File Home HR Record Queries **Recruitment**

New Edit Delete View Define Save Print Print Preview Expand Collapse Select Enable Filtering Word Excel Notes Search Attachments Notes Other Recruitment

Maintenance Grid Options

Definitions (0000006287) Vacancy Workbench

Drag a column header here to group by that column.

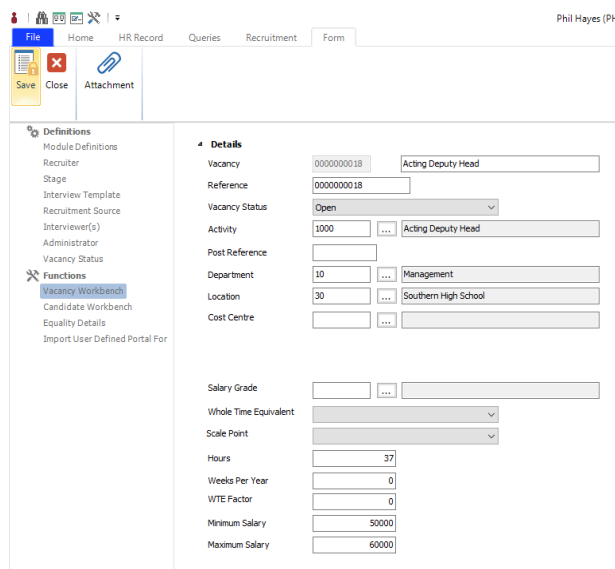
| Vacancy    | Vacancy Status    | Department            | Description             | Activity                  | Reference  | Maximum Salary | Minimum Salary | Contract Start Date |
|------------|-------------------|-----------------------|-------------------------|---------------------------|------------|----------------|----------------|---------------------|
| 0000000004 | Open              | Management            | Test HR Director        | Director of HR            | 001        | 70000.00       | 50000.00       | 02/02/2020          |
| 0000000005 | Open              | Management            | Business Manager        | Business Manager          | 0000000005 | 60000.00       | 45000.00       | 29/11/2019          |
| 0000000006 | Rejected          | Administration        | Admin II                | Administrator             | 0000000006 | 50000.00       | 35000.00       | 29/11/2019          |
| 0000000007 | Open              | Key Skills Dept       | Administrative Assistan | Administrative Assistant  | 0000000007 | 25000.00       | 15000.00       | 01/12/2019          |
| 0000000008 | Open              | Music Art and Drama D | ASL II                  | Afterschool Lead          | 0000000008 | 25000.00       | 20000.00       | 30/11/2019          |
| 0000000009 | Open              | Languages Dept        | Test Deputy Head        | Acting Head               | TDH - PH   | 53000.00       | 50000.00       | 26/11/2019          |
| 0000000010 | Awaiting Approval | Management            | ICT Technician          | ICT Technician            | 0000000010 | 22000.00       | 20000.00       | 02/12/2019          |
| 0000000011 | Awaiting Approval | Key Skills Dept       | test PH                 | Acting Head               | 0000000011 | 33000.00       | 30000.00       | 30/11/2019          |
| 0000000012 | Open              | Humanities Dept       | Assistant Head of Acad  | Assistant Head of Academy | 003        | 40000.00       | 35000.00       | 24/01/2020          |
| 0000000013 | Open              | Administration        | Admin Lead 3            | Admin Lead                | 0000000013 | 35000.00       | 25000.00       | 02/12/2019          |
| 0000000014 | Awaiting Approval | Management            | 0003                    | HR Business Partner       | HRBP       | 30000.00       | 20000.00       |                     |
| 0000000015 | Open              | Management            | BH 1                    | Behaviour Manager         | 002        | 45000.00       | 35000.00       | 21/01/2020          |
| 0000000018 | Awaiting Approval | Management            | Acting Deputy Head      | Acting Deputy Head        | 0000000018 | 60000.00       | 50000.00       | 12/01/2020          |

## To Approve the Vacancy:

Select the Vacancy, click **Edit** and undertake 4 actions:

### 1. Details

Check the details presented generated from the Vacancy request are correct as these will form part of the live I Frame (job advert). The details can be amended at this point.

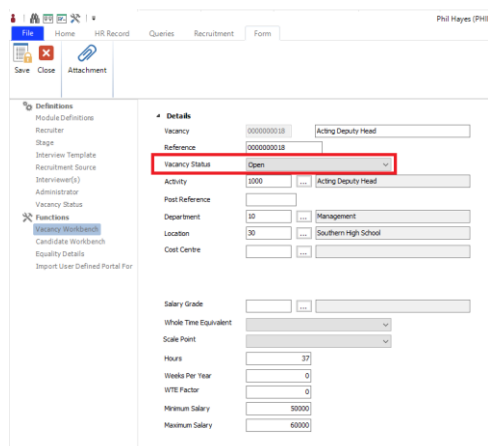


The screenshot shows the 'Details' section of a vacancy form. The 'Vacancy Status' dropdown menu is set to 'Open'. Other fields include Vacancy (0000000018), Reference (0000000018), Activity (1000), Department (10), Location (30), and various salary and time-related fields.

|                       |            |                      |
|-----------------------|------------|----------------------|
| Vacancy               | 0000000018 | Acting Deputy Head   |
| Reference             | 0000000018 |                      |
| Vacancy Status        | Open       |                      |
| Activity              | 1000       | Acting Deputy Head   |
| Post Reference        |            |                      |
| Department            | 10         | Management           |
| Location              | 30         | Southern High School |
| Cost Centre           |            |                      |
| Salary Grade          |            |                      |
| Whole Time Equivalent |            |                      |
| Scale Point           |            |                      |
| Hours                 | 37         |                      |
| Weeks Per Year        | 0          |                      |
| WTE Factor            | 0          |                      |
| Minimum Salary        | 50000      |                      |
| Maximum Salary        | 60000      |                      |

### 2. Vacancy Status

Ensure the Vacancy Status is set to **Open**. This status is required for publication of the Vacancy on your website.



This screenshot is identical to the previous one, but the 'Vacancy Status' dropdown menu is highlighted with a red box to emphasize that it should be set to 'Open'.

### 3. Closing Date

A future Closing Date must be added.

The Vacancy will be automatically removed from your website at midnight of the Closing Date.

#### 4 Key Dates

|                     |                               |
|---------------------|-------------------------------|
| Date Approved       | <input type="text" value=""/> |
| Date Advertised     | <input type="text" value=""/> |
| Closing Date        | 06/01/2020                    |
| Interview Date      | <input type="text" value=""/> |
| Date Filled         | <input type="text" value=""/> |
| Appointment Date    | <input type="text" value=""/> |
| Contract Start Date | 12/01/2020                    |
| Contract End Date   | <input type="text" value=""/> |

### 4. Stages

Move all **Available** stages to **Selected** by clicking **Add All** so they are available for use later within the process.

4 Stages

|           |   |  |             |  |
|-----------|---|--|-------------|--|
| Available |   | Selected   |             | Interview Template   |
|           | <p>▶ Add</p> <p>▶▶ Add All</p> <p>◀ Remove</p> <p>◀◀ Remove All</p> | <p>AP - Appointed</p> <p>DR - Draft</p> <p>OF - Offered</p> <p>PA - Please approve for provisional offer</p> <p>SA - Application Submitted</p> <p>SH - Shortlisted</p> <p>SS001 - Invite to Interview</p> <p>ST010 - Approved for first interview</p> <p>ST020 - Rejected as unsuitable candidate</p> <p>ST030 - Approved for second interview</p> <p>ST040 - Rejected after first interview</p> <p>ST050 - Approved for provisional offer</p> <p>ST060 - Rejected after second interview</p> <p>ST070 - Acceptable references received</p> <p>ST080 - Acceptable references not received</p> <p>ST090 - Approved for start date</p> | <p>Save</p> | <p>All day, 1 hour slots</p> <p>None</p>   |
|           |   |  |             | <p>Stage Changes</p> <p><input checked="" type="radio"/> As Selected Above</p> <p><input type="radio"/> If Empty</p> <p style="text-align: right;">Run</p> |

You will note that the Vacancy Status has changed from **Awaiting Approval** to **Open**.

Phil Hayes (PHIL) - Jane HR - Jane Systems (99999) - Trainers Shared Database - Philip Hayes (987652) - Curren

File Home HR Record Queries Recruitment

New Edit Delete View Define Save Print Print Preview Expand Collapse Select Enable Filtering Word Excel Notes Search Attachments (0) Notes Close

Maintenance Grid Options Office Functions Display Search Other Recruitment

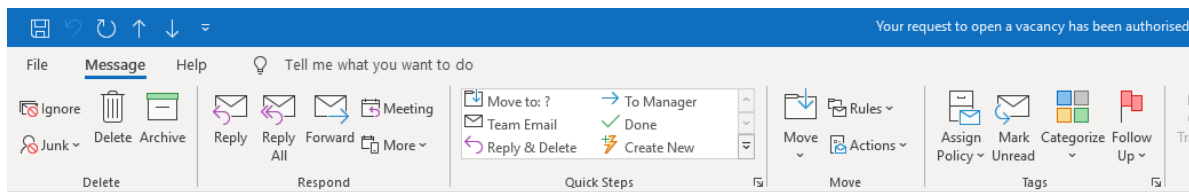
(0000008287) Vacancy Workbench

Definitions  
Module Definitions  
Recruiter  
Stage  
Interview Template  
Recruitment Source  
Interviewer(s)  
Administrator  
Vacancy Status  
Functions  
Vacancy Workbench  
Candidate Workbench  
Equality Details  
Import User Defined Portal For

Drag a column header here to group by that column.

| Vacancy    | Vacancy Status    | Department       | Description              | Activity                 | Reference  | Maximum Salary | Minimum Salary | Contract Start Date |
|------------|-------------------|------------------|--------------------------|--------------------------|------------|----------------|----------------|---------------------|
| 0000000004 | Open              | Management       | Test HR Director         | Director of HR           | 001        | 70000.00       | 50000.00       | 02/02/2020          |
| 0000000005 | Open              | Management       | Business Manager         | Business Manager         | 0000000005 | 60000.00       | 45000.00       | 29/11/2019          |
| 0000000006 | Rejected          | Administration   | Admin II                 | Administrator            | 0000000006 | 50000.00       | 35000.00       | 29/11/2019          |
| 0000000007 | Open              | Key Skills Dept  | Administrative Assistant | Administrative Assistant | 0000000007 | 25000.00       | 15000.00       | 01/12/2019          |
| 0000000008 | Open              | Music Art and Dr | ASL II                   | Afterschool Lead         | 0000000008 | 25000.00       | 20000.00       | 30/11/2019          |
| 0000000009 | Open              | Languages Dept   | Test Deputy Head         | Acting Head              | TDH - PH   | 53000.00       | 50000.00       | 26/11/2019          |
| 0000000010 | Awaiting Approval | Management       | ICT Technician           | ICT Technician           | 0000000010 | 22000.00       | 20000.00       | 02/12/2019          |
| 0000000011 | Awaiting Approval | Key Skills Dept  | test PH                  | Acting Head              | 0000000011 | 33000.00       | 30000.00       | 30/11/2019          |
| 0000000012 | Open              | Humanities Dept  | Assistant Head of Academ | Assistant Head of Academ | 003        | 40000.00       | 35000.00       | 24/01/2020          |
| 0000000013 | Open              | Administration   | Admin Lead 3             | Admin Lead               | 0000000013 | 35000.00       | 25000.00       | 02/12/2019          |
| 0000000014 | Awaiting Approval | Management       | 0003                     | HR Business Partner      | HRBP       | 30000.00       | 20000.00       |                     |
| 0000000015 | Open              | Management       | BH 1                     | Behaviour Manager        | 002        | 45000.00       | 35000.00       | 21/01/2020          |
| 0000000018 | Open              | Management       | Acting Deputy Head       | Acting Deputy Head       | 0000000018 | 60000.00       | 50000.00       | 12/01/2020          |

A Workflow will be generated on the back of the above Status change, informing the Line Manager that a new Vacancy has been opened and Approved.



Your request to open a vacancy has been authorised



jane.callum.williams@gmail.com  
To Philip Hayes

Hi,

Your request to open a vacancy:

Activity: Acting Deputy Head  
Description: Acting Deputy Head  
Contract Start Date: 12/01/2020

Has been approved.

## I Frame

The Vacancy is now live and appears on the I Frame which will be visible on the careers section of your website.

The I Frame panel as shown below displays the login and registration buttons, and all Open Vacancies, and will be injected into a suitable location on the careers section of your website.

The I Frame is locked and controlled by a corresponding Query in PSP.

Candidates can apply for the Vacancy through the I Frame using an online version of the application form as provided by the client.

[LOG IN](#) [REGISTER](#)

### VACANCIES

SEARCH

#### TEST HR DIRECTOR

Reference: 001  
 Vacancy: 0000000004  
 Department: Management  
 Hours: 37  
 Location: 40  
 Minimum Salary: £50,000  
 Maximum Salary: £70,000  
 Closing Date: 15/11/2020

[READ MORE](#)

#### BUSINESS MANAGER

Reference: 0000000005  
 Vacancy: 0000000005  
 Department: Management  
 Salary Grade: K  
 Location: 40  
 Minimum Salary: £45,000  
 Maximum Salary: £60,000  
 Closing Date: 14/11/2020

[READ MORE](#)

#### ASSISTANT HEAD OF ACADEMY

Reference: 003  
 Vacancy: 0000000012  
 Department: Humanities Dept  
 Location: 10  
 Minimum Salary: £35,000  
 Maximum Salary: £40,000  
 Closing Date: 25/12/2019

[READ MORE](#)

#### ACTING DEPUTY HEAD

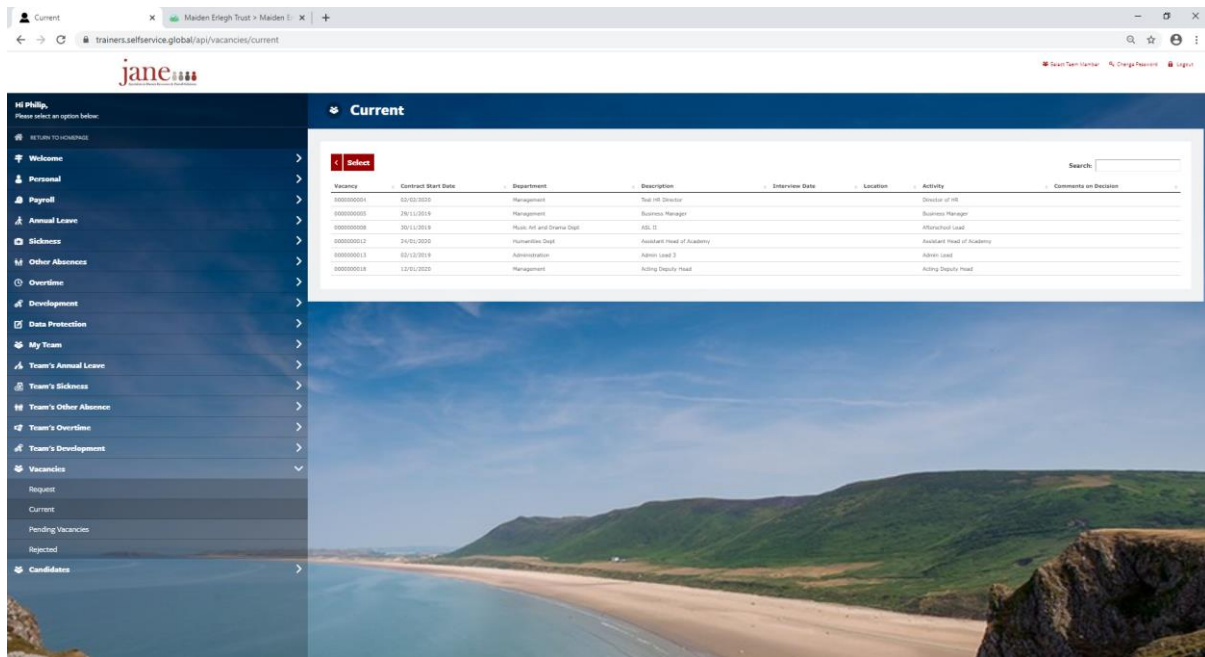
Reference: 0000000018  
 Vacancy: 0000000018  
 Department: Management  
 Hours: 37  
 Location: 30  
 Minimum Salary: £50,000  
 Maximum Salary: £60,000  
 Closing Date: 06/01/2020

[READ MORE](#)

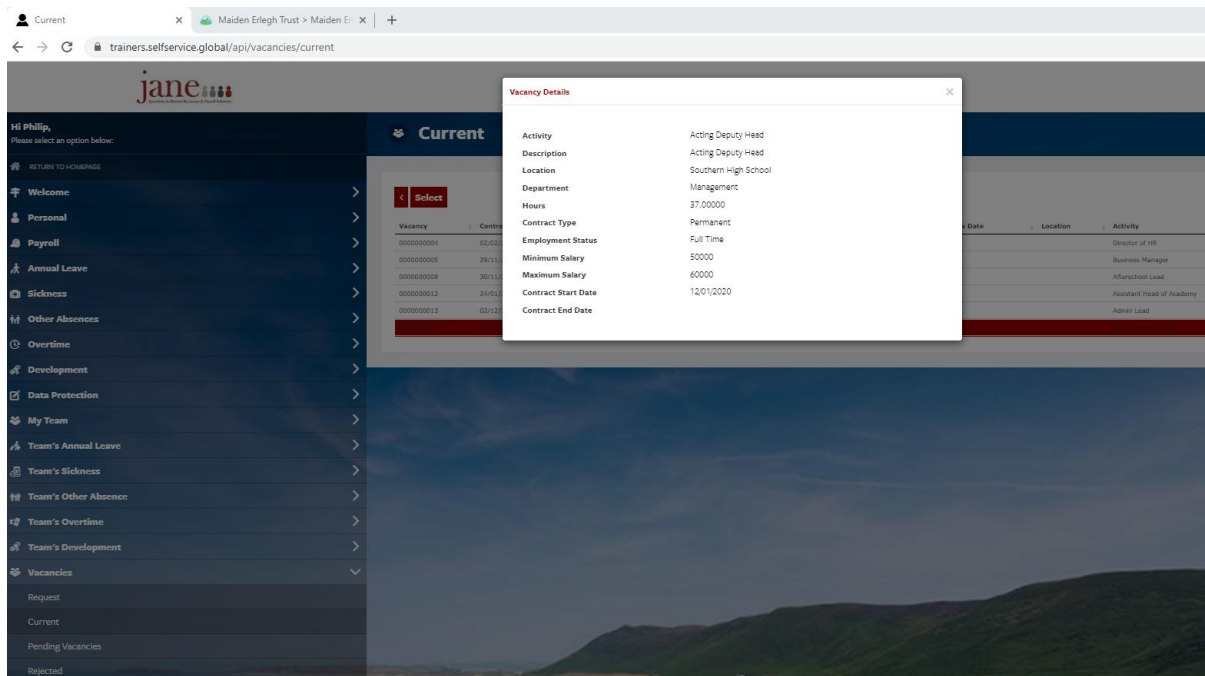


## Vacancies - Current

The Vacancy now appears in the **Current** queue within the Portal.



Select the required Vacancy to display further details.



## Windows Application – Stages

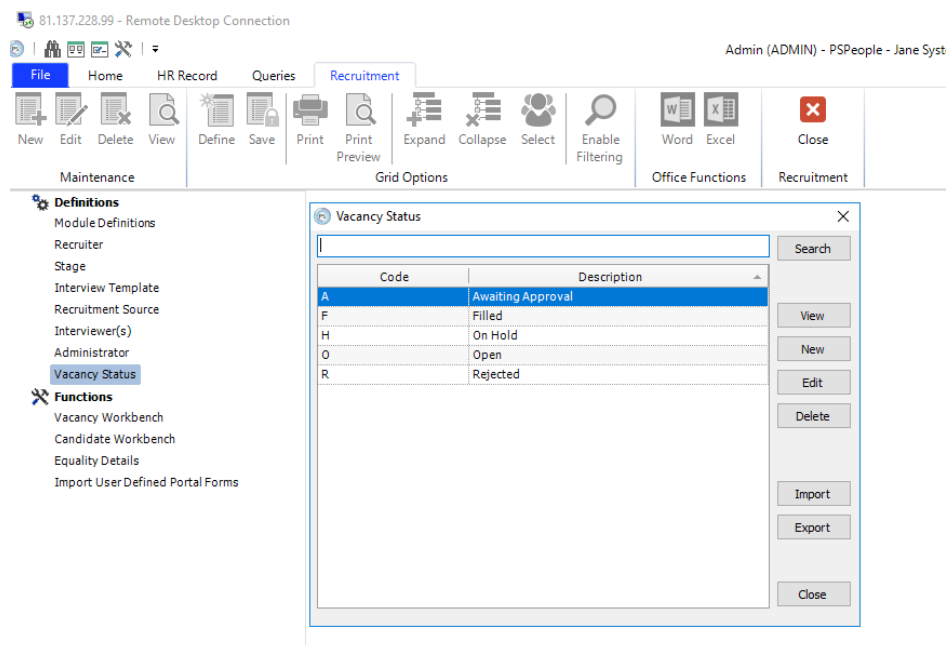
The Recruitment module provides the below stages as standard. The Stages can be used to trigger Workflows. Further stages may be added and are chargeable upon request.

### Vacancy Stages

These are updated by the HR Recruiter in the Vacancy Workbench when managing the Vacancy.

There is a Code and Description for each Stage.

These are located at **Recruitment > Definitions > Vacancy Status**



The screenshot shows a remote desktop connection to a Windows application. The interface includes a top menu bar with 'File', 'Home', 'HR Record', 'Queries', and 'Recruitment'. Below the menu is a toolbar with icons for 'New', 'Edit', 'Delete', 'View', 'Define', 'Save', 'Print', 'Print Preview', 'Expand', 'Collapse', 'Select', 'Enable Filtering', 'Word', 'Excel', and 'Close'. A left-hand navigation pane lists 'Definitions' (Module Definitions, Recruiter, Stage, Interview Template, Recruitment Source, Interviewer(s), Administrator, Vacancy Status) and 'Functions' (Vacancy Workbench, Candidate Workbench, Equality Details, Import User Defined Portal Forms). The 'Vacancy Status' window is open, displaying a table with the following data:

| Code | Description       |
|------|-------------------|
| A    | Awaiting Approval |
| F    | Filled            |
| H    | On Hold           |
| O    | Open              |
| R    | Rejected          |

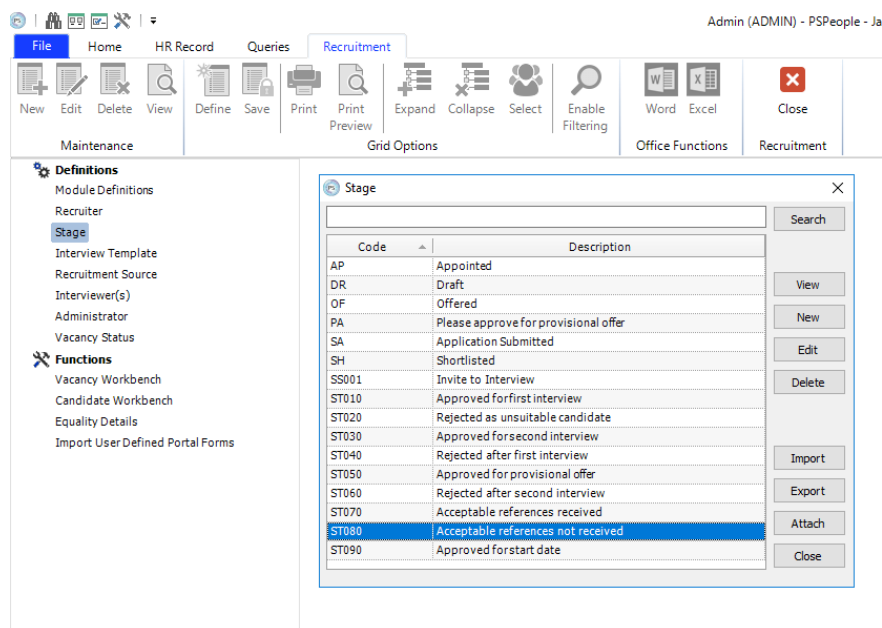
The window also features a search bar, a 'View' button, and a vertical toolbar on the right with buttons for 'New', 'Edit', 'Delete', 'Import', 'Export', and 'Close'.

## Candidate Stages

The Candidate Stages are attached to the Candidate by the Recruiter to reflect the current status of the applicant.

There is a Code and Description for each Stage.

These are located at **Recruitment > Definitions > Stage**



Admin (ADMIN) - PSpeople - Ja

File Home HR Record Queries Recruitment

New Edit Delete View Define Save Print Print Preview Expand Collapse Select Enable Filtering Word Excel Close

Maintenance Grid Options Office Functions Recruitment

**Definitions**

- Module Definitions
- Recruiter
- Stage**
- Interview Template
- Recruitment Source
- Interviewer(s)
- Administrator
- Vacancy Status

**Functions**

- Vacancy Workbench
- Candidate Workbench
- Equality Details
- Import User Defined Portal Forms

**Stage**

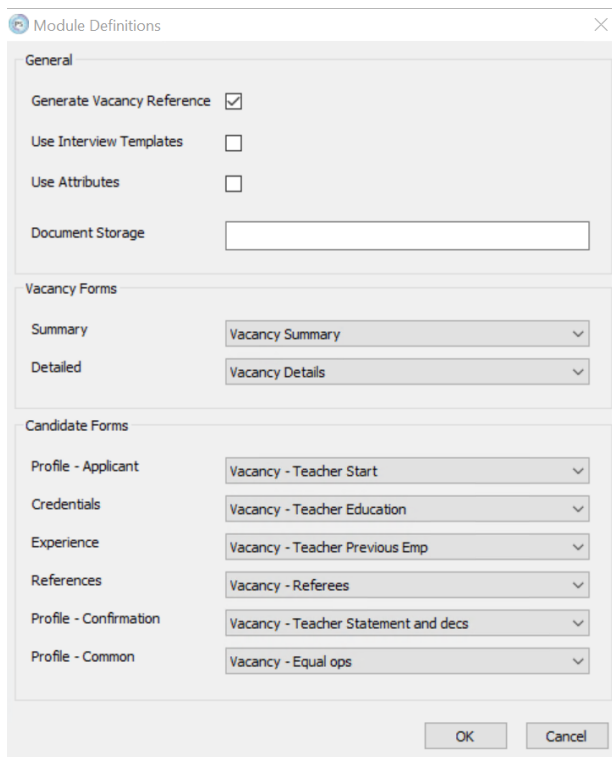
| Code  | Description                          |
|-------|--------------------------------------|
| AP    | Appointed                            |
| DR    | Draft                                |
| OF    | Offered                              |
| PA    | Please approve for provisional offer |
| SA    | Application Submitted                |
| SH    | Shortlisted                          |
| SS001 | Invite to Interview                  |
| ST010 | Approved for first interview         |
| ST020 | Rejected as unsuitable candidate     |
| ST030 | Approved for second interview        |
| ST040 | Rejected after first interview       |
| ST050 | Approved for provisional offer       |
| ST060 | Rejected after second interview      |
| ST070 | Acceptable references received       |
| ST080 | Acceptable references not received   |
| ST090 | Approved for start date              |

Search View New Edit Delete Import Export Attach Close

## Default Forms Displayed on the I Frame.

These can be changed by following the below steps:

1. Open the Recruitment Module.
2. Open Module Definitions.
3. Select the forms you want to display on each vacancy by default.
4. Click OK to Save.



Module Definitions

General

Generate Vacancy Reference

Use Interview Templates

Use Attributes

Document Storage

Vacancy Forms

Summary

Detailed

Candidate Forms

Profile - Applicant

Credentials

Experience

References

Profile - Confirmation

Profile - Common

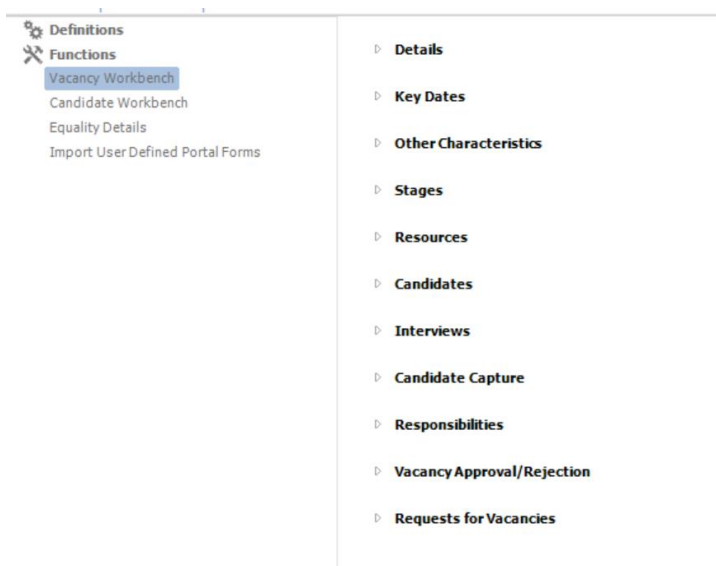
OK Cancel

## Candidate Capture

This is used to publish different forms on the I Frame, for example Teaching and Support forms. A default set of forms can be selected.

To select alternative forms to the default via Candidate Capture:

1. Open the Recruitment Module.
2. Edit a vacancy that you want to change the forms that are displayed on the iframe.
3. Scroll down to Candidate Capture



4. Click the arrow to open Candidate Capture.

**4 Candidate Capture**

Vacancy Forms

Summary

Detailed

Candidate Forms

Profile

Credentials

Experience

References

Further Details

Common Details

5. Change the drop downs to display the forms you want to display for the Vacancy.

#### 4 Candidate Capture

##### Vacancy Forms

Summary

Detailed

##### Candidate Forms

Profile

Credentials

Experience

References

Further Details

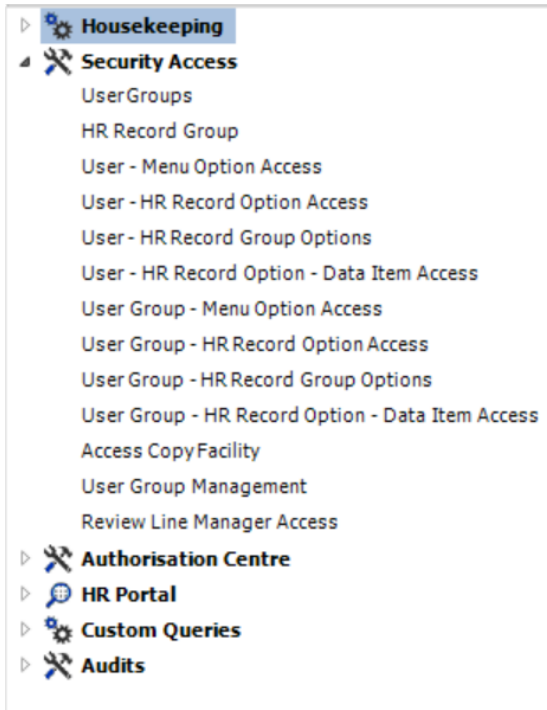
Common Details

6. Now Click Save. The vacancy on the I Frame will now display the alternative forms.

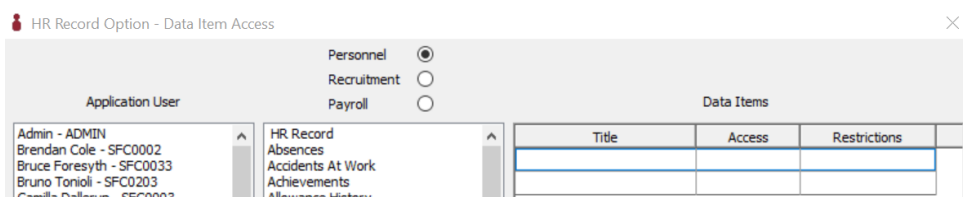
## Data Item Access

Use Data Item Access to control which Vacancies and Candidates are viewable on the Portal.

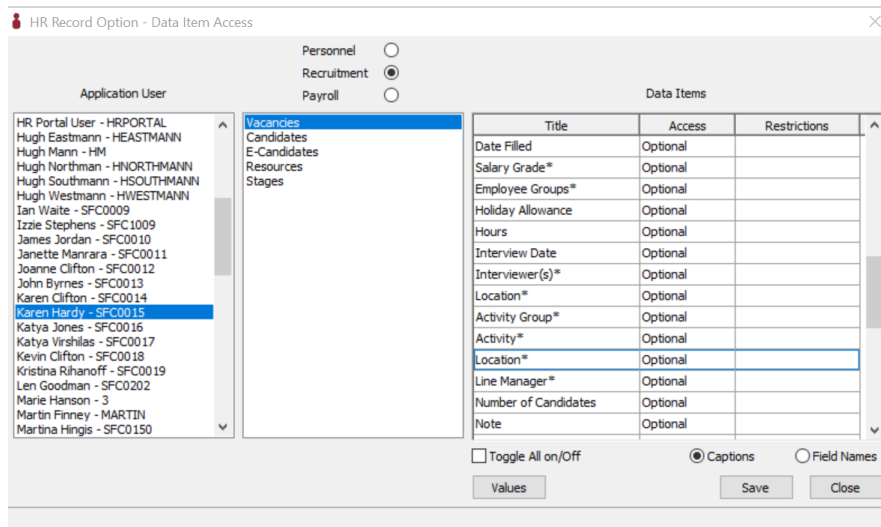
1. Click System setup on the ribbon.
2. Open Security Access.



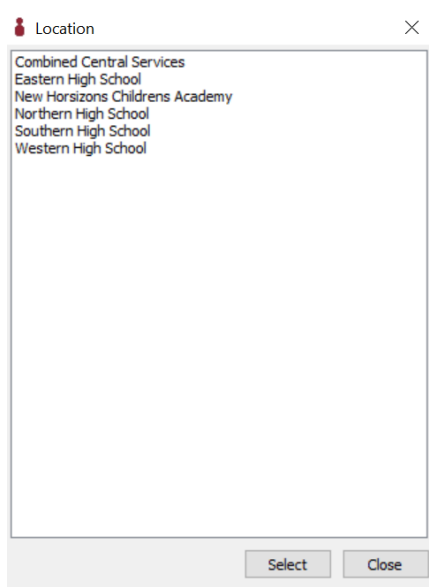
3. Click on User – HR Record Option – Data Item Access
4. In the new window that opens change the selection to Recruitment



5. In the Application User select the staff member that you want to change access for.
6. In the middle box select Vacancies.
7. Now the Data Items box populates with all the fields you can change staff members access.

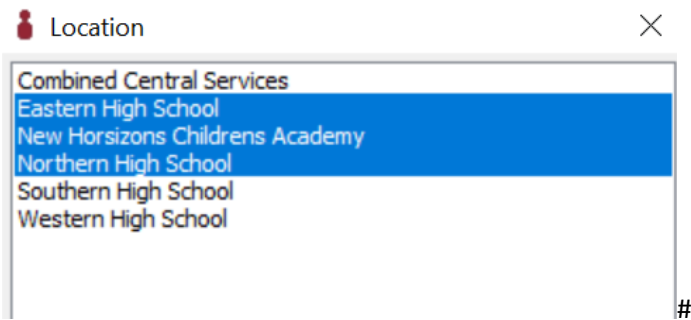


8. If you wanted to restrict by School for example scroll down to the second Location field.
9. Click in the Restrictions box then click Values
10. A new window opens for you select the locations





11. Click on the location/s then click select.



12. The fields are now populated. Click Save before you leave.

## Process Summary Checkpoint

- New Vacancy requested through the Self-Service Portal.
- Workflow generated to alert HR a new Vacancy has been requested.
- Vacancy checked and approved by HR Team in Windows Application.
- Workflow generated notifying the Vacancy has been opened and approved or rejected.
- I Frame has been created and is now live on the Vacancies section of your website.
- Candidate can now search for the Vacancy and apply online.

The candidate can find out more about the Vacancy by clicking **Read More**.

Note that the fields displayed can be changed on the I Frame, see section “Changing I Frame Content” for instructions.

Clicking **Read More** opens further details relating to the Vacancy.

### ACTING DEPUTY HEAD

---

|                        |            |
|------------------------|------------|
| <b>Reference:</b>      | 0000000018 |
| <b>Vacancy:</b>        | 0000000018 |
| <b>Department:</b>     | Management |
| <b>Hours:</b>          | 37         |
| <b>Location:</b>       | 30         |
| <b>Minimum Salary:</b> | £50,000    |
| <b>Maximum Salary:</b> | £60,000    |
| <b>Closing Date:</b>   | 06/01/2020 |

[READ MORE](#) 

## Vacancy Details

In the below example, we have included default settings such as the Activity and Department. The fields displayed as below can be configured differently upon request.

[VACANCIES](#)[LOG IN](#)[REGISTER](#)

### ACTING DEPUTY HEAD

#### SUMMARY

---

|                     |                    |
|---------------------|--------------------|
| <b>Description</b>  | Acting Deputy Head |
| <b>Reference</b>    | 0000000018         |
| <b>Closing Date</b> | 06/01/2020         |

#### DETAILS

---

|                       |                    |
|-----------------------|--------------------|
| <b>Activity</b>       | Acting Deputy Head |
| <b>Description</b>    | Acting Deputy Head |
| <b>Hours</b>          | 37                 |
| <b>Weeks Per Year</b> | 0                  |
| <b>Department</b>     | Management         |
| <b>Minimum Salary</b> | £50,000            |
| <b>Maximum Salary</b> | £60,000            |
| <b>Contract Type</b>  | Permanent          |

#### DOCUMENTS

---

There are no additional documents for this vacancy.

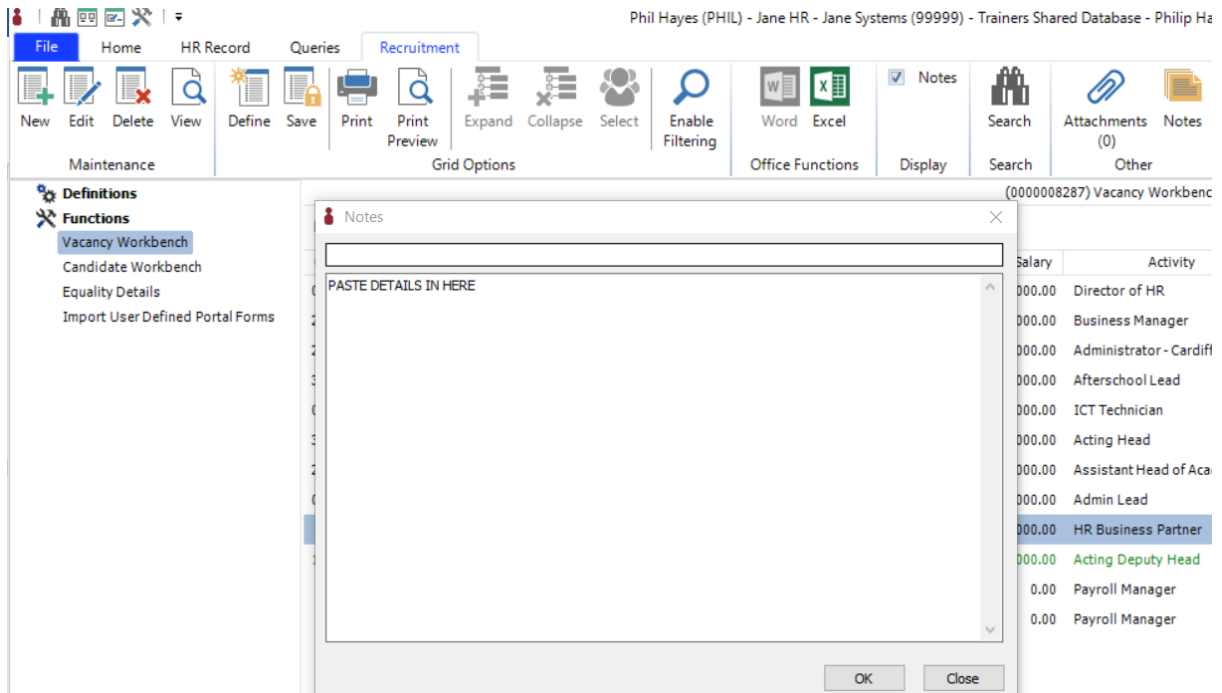
Please [log in](#) to apply for this vacancy. If you are not registered yet you can [register here](#).

[← BACK](#)

## Adding further details to the Vacancy

To add further supporting information relating to the Vacancy, such as a Job Specification, type or paste the details into the blank box:

### Vacancy Workbench > Notes



Phil Hayes (PHIL) - Jane HR - Jane Systems (99999) - Trainers Shared Database - Philip Ha

File Home HR Record Queries Recruitment

New Edit Delete View Define Save Print Print Preview Expand Collapse Select Enable Filtering Word Excel Notes Attachments (0) Notes

Maintenance Grid Options Office Functions Display Search Other

Definitions Functions Vacancy Workbench Candidate Workbench Equality Details Import User Defined Portal Forms

(000008287) Vacancy Workbench

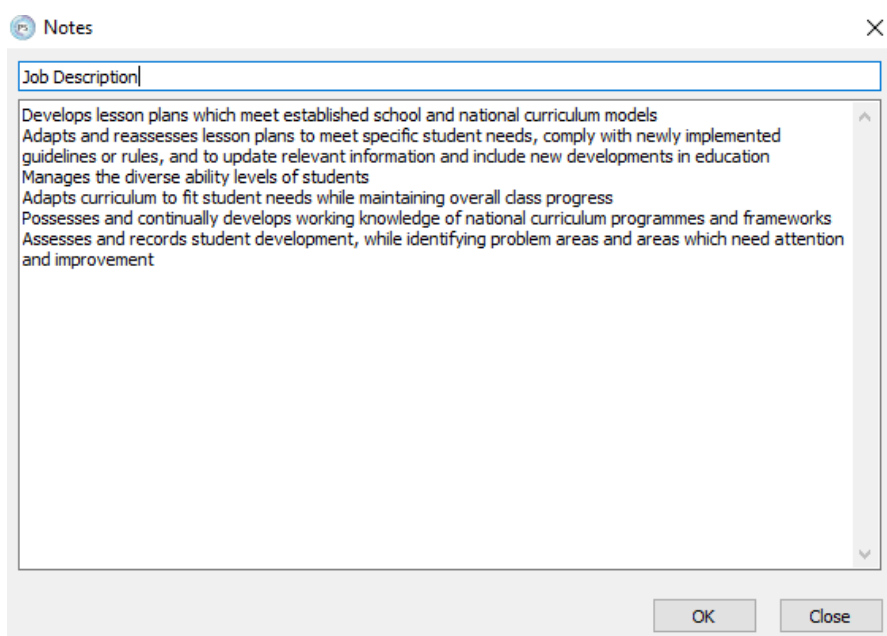
Notes

PASTE DETAILS IN HERE

| Salary | Activity                |
|--------|-------------------------|
| 000.00 | Director of HR          |
| 000.00 | Business Manager        |
| 000.00 | Administrator - Cardiff |
| 000.00 | Afterschool Lead        |
| 000.00 | ICT Technician          |
| 000.00 | Acting Head             |
| 000.00 | Assistant Head of Aca   |
| 000.00 | Admin Lead              |
| 000.00 | HR Business Partner     |
| 000.00 | Acting Deputy Head      |
| 0.00   | Payroll Manager         |
| 0.00   | Payroll Manager         |

OK Close

Example:



Notes

Job Description

Develops lesson plans which meet established school and national curriculum models  
Adapts and reassesses lesson plans to meet specific student needs, comply with newly implemented guidelines or rules, and to update relevant information and include new developments in education  
Manages the diverse ability levels of students  
Adapts curriculum to fit student needs while maintaining overall class progress  
Possesses and continually develops working knowledge of national curriculum programmes and frameworks  
Assesses and records student development, while identifying problem areas and areas which need attention and improvement

OK Close



This will then publish the Job Description text on the live Vacancy.

VACANCIES

LOG IN

REGISTER

## TESTING

### SUMMARY

---

|                |                  |
|----------------|------------------|
| Activity       | Accountant       |
| Description    | TESTING          |
| Hours          | 21               |
| Department     | Domestic Science |
| Minimum Salary | £21              |
| Maximum Salary | £13              |
| Contract Type  | Permanent        |

### DETAILS

---

|              |            |
|--------------|------------|
| Description  | TESTING    |
| Reference    | 000000029  |
| Closing Date | 21/01/2021 |

### JOB DESCRIPTION

---

Develops lesson plans which meet established school and national curriculum models  
Adapts and reassesses lesson plans to meet specific student needs, comply with newly implemented guidelines or rules, and to update relevant information and include new developments in education  
Manages the diverse ability levels of students  
Adapts curriculum to fit student needs while maintaining overall class progress  
Possesses and continually develops working knowledge of national curriculum programmes and frameworks  
Assesses and records student development, while identifying problem areas and areas which need attention and improvement

### DOCUMENTS

---

There are no additional documents for this vacancy.

Please [log in](#) to apply for this vacancy. If you are not registered yet you can [register here](#).

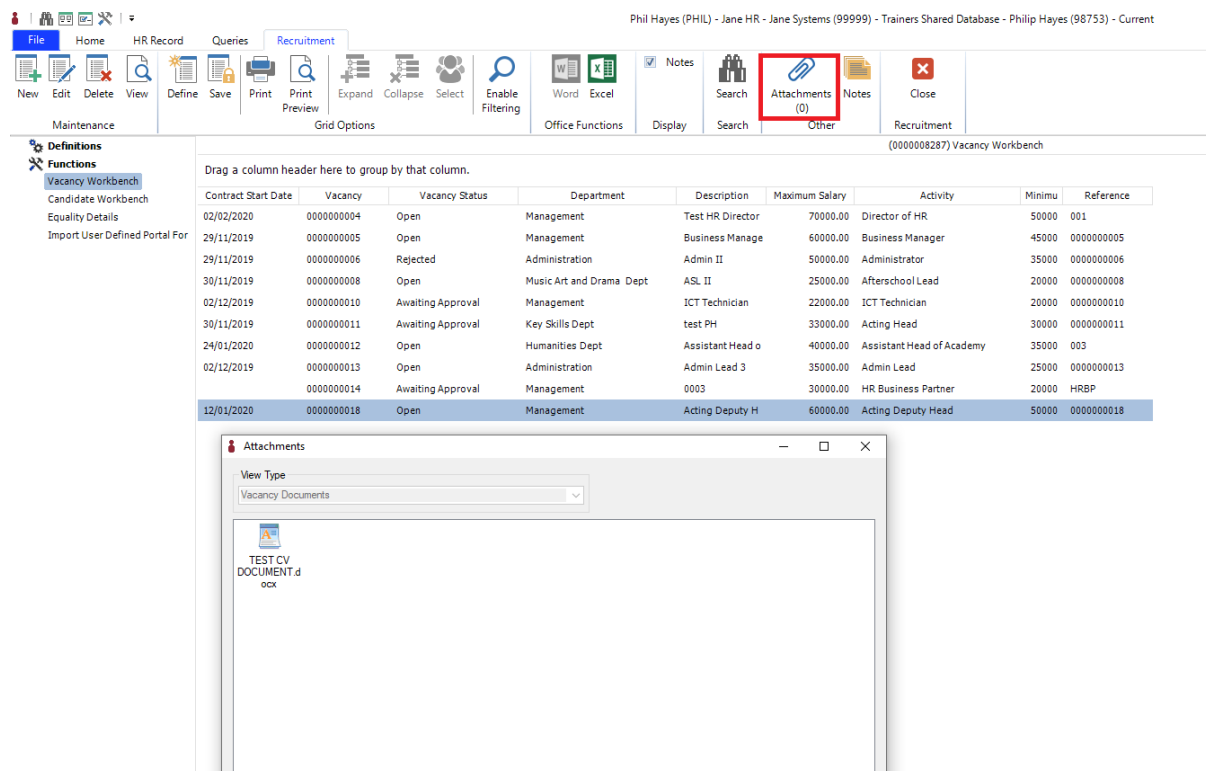
[BACK](#)

## Attaching Documents

Attach any number of supporting documents to give further clarification to the Vacancy, for example a Job Specification in PDF format.

To attach a document to the Vacancy on the I Frame:

From the Vacancy Workbench, Select the Paperclip Attachment from the Toolbar to import the desired document from your local machine.



The screenshot shows the Vacancy Workbench interface. The top toolbar includes an 'Attachments' icon (a paperclip) which is highlighted with a red box. Below the toolbar is a table of vacancies with the following data:

| Contract Start Date | Vacancy    | Vacancy Status    | Department               | Description      | Maximum Salary | Activity                  | Minimu | Reference  |
|---------------------|------------|-------------------|--------------------------|------------------|----------------|---------------------------|--------|------------|
| 02/02/2020          | 0000000004 | Open              | Management               | Test HR Director | 70000.00       | Director of HR            | 50000  | 001        |
| 29/11/2019          | 0000000005 | Open              | Management               | Business Manage  | 60000.00       | Business Manager          | 45000  | 0000000005 |
| 29/11/2019          | 0000000006 | Rejected          | Administration           | Admin II         | 50000.00       | Administrator             | 35000  | 0000000006 |
| 30/11/2019          | 0000000008 | Open              | Music Art and Drama Dept | ASL II           | 25000.00       | Afterschool Lead          | 20000  | 0000000008 |
| 02/12/2019          | 0000000010 | Awaiting Approval | Management               | ICT Technician   | 22000.00       | ICT Technician            | 20000  | 0000000010 |
| 30/11/2019          | 0000000011 | Awaiting Approval | Key Skills Dept          | test PH          | 33000.00       | Acting Head               | 30000  | 0000000011 |
| 24/01/2020          | 0000000012 | Open              | Humanities Dept          | Assistant Head o | 40000.00       | Assistant Head of Academy | 35000  | 003        |
| 02/12/2019          | 0000000013 | Open              | Administration           | Admin Lead 3     | 35000.00       | Admin Lead                | 25000  | 0000000013 |
|                     | 0000000014 | Awaiting Approval | Management               | 0003             | 30000.00       | HR Business Partner       | 20000  | HRBP       |
| 12/01/2020          | 0000000018 | Open              | Management               | Acting Deputy H  | 60000.00       | Acting Deputy Head        | 50000  | 0000000018 |

An 'Attachments' dialog box is open in the foreground, showing a 'View Type' dropdown set to 'Vacancy Documents' and a list of files including 'TEST CV DOCUMENT.docx'.

Re-refresh the I Frame and the document will be present on the Vacancy:

### DOCUMENTS

The following documents are available relating to this vacancy:

[TEST JOB SPECIFICATION.docx](#)

Please [log in](#) to apply for this vacancy. If you are not registered yet you can [register here](#).

[← BACK](#)



## Applying for the Vacancy

New candidates will need to Register for an account by filling in the below form:

VACANCIES LOG IN

### REGISTER

\*First Name:  \*Last Name:

\*E-Mail:

\*Password:  \*Confirm Password:

REGISTER

Log in to view the current Vacancies and apply.

Use the link to re-set a forgotten password.

VACANCIES REGISTER

### LOG IN

Email:

Password:

Forgotten your password? [Click here to reset it](#)

LOG IN

Any Vacancies requested through the Portal and approved through the Windows Application will appear immediately as live on your website through the I Frame.

[DASHBOARD](#) [LOGOUT](#)

## VACANCIES

[SEARCH](#)

### TEST HR DIRECTOR

**Reference:** 001  
**Vacancy:** 0000000004  
**Department:** Management  
**Hours:** 37  
**Location:** 40  
**Minimum Salary:** £50,000  
**Maximum Salary:** £70,000  
**Closing Date:** 15/11/2020

[READ MORE >](#)

### BUSINESS MANAGER

**Reference:** 0000000005  
**Vacancy:** 0000000005  
**Department:** Management  
**Salary Grade:** K  
**Location:** 40  
**Minimum Salary:** £45,000  
**Maximum Salary:** £60,000  
**Closing Date:** 14/11/2020

[READ MORE >](#)

### ASSISTANT HEAD OF ACADEMY

**Reference:** 003  
**Vacancy:** 0000000012  
**Department:** Humanities Dept  
**Location:** 10  
**Minimum Salary:** £35,000  
**Maximum Salary:** £40,000  
**Closing Date:** 25/12/2019

[READ MORE >](#)

### ACTING DEPUTY HEAD

**Reference:** 0000000018  
**Vacancy:** 0000000018  
**Department:** Management  
**Hours:** 37  
**Location:** 30  
**Minimum Salary:** £50,000  
**Maximum Salary:** £60,000  
**Closing Date:** 06/01/2020

[READ MORE >](#)

**Select the desired Vacancy by selecting Read More > and apply**

## DOCUMENTS

The following documents are available relating to this vacancy:

[TEST JOB SPECIFICATION.docx](#)

Please [log in](#) to apply for this vacancy. If you are not registered yet you can [register here](#).

[← BACK](#)



An application form will now be presented for the Candidate to complete. As part of your REC02 delivery we will transpose your paper application form(s) into online versions, which will be split out across multiple tabs for completion. The Candidate will need to complete each tab, ensuring mandatory fields are completed where marked with a red asterisk \*

Please see below example Application Form.

VACANCIES DASHBOARD LOGOUT

## APPLY


Please be aware that your log in session is 20 minutes. Make sure you save a draft or submit before this time expires.

### VACANCY SUMMARY

|              |                    |
|--------------|--------------------|
| Description  | Acting Deputy Head |
| Reference    | 0000000018         |
| Closing Date | 06/01/2020         |

1. Personal Details 2. Qualifications 3. Referees

### 1. PERSONAL DETAILS

|                  |   |
|------------------|---|
| Title            | <input type="text" value="Please select..."/>   |
| Forenames        | <input type="text"/>  |
| Date Of Birth    | <input type="text" value="dd-mm-yyyy"/>  |
| Marital Status   | <input type="text" value="Please select..."/>   |
| Gender           | <input type="text" value="Please select..."/>   |
| Country of Birth | <input type="text" value="Please select..."/>   |
| Ethnic Origin    | <input type="text" value="Please select..."/>   |

NEXT 


\* indicates a required field


### ATTACHMENTS

You may attach your CV to this application if you wish, but doing so is optional.

 ATTACH YOUR CV

You may attach up to 2 supporting documents to this application.

 ATTACH SUPPORTING DOCUMENT

BACK SAVE DRAFT SUBMIT APPLICATION 

## Other Features of the Application Form

We do advise saving the application regularly when working through the tabs.

### Candidate Dashboard

Partially completed / draft applications can be saved and accessed through the Candidate Dashboard

[VACANCIES](#) [LOGOUT](#)

---

DASHBOARD

YOUR DETAILS

|              |                                 |
|--------------|---------------------------------|
| <b>Name</b>  | Philip Hayes                    |
| <b>Email</b> | philip.hayes@jane-systems.co.uk |

[EDIT YOUR LOGIN INFO](#) [EDIT YOUR SAVED APPLICATION](#)

YOUR APPLICATIONS

| Reference | Title              | Last Updated | Status |
|-----------|--------------------|--------------|--------|
| 000000009 |                    | 02/12/2019   | Draft  |
| 000000015 |                    | 02/12/2019   | Draft  |
| 000000018 | Acting Deputy Head | 23/12/2019   | Draft  |

### Attachments

Candidates can attach CV's and Supporting documents to supplement their application using the below import functionality.

#### ATTACHMENTS

You may attach your CV to this application if you wish, but doing so is optional.

[ATTACH YOUR CV](#)

You may attach up to 2 supporting documents to this application.

[ATTACH SUPPORTING DOCUMENT](#)

[← BACK](#)

[SAVE DRAFT](#)

[SUBMIT APPLICATION →](#)

## Submitting Application

Once all the tabs on the form have been completed, then click the Submit Application button.

SUBMIT APPLICATION 

The Candidate will be advised if there are any errors with the forms, with a message for correction presented on screen, for example:

### ATTACHMENTS

You may attach your CV to this application if you wish, but doing so is optional.


 ATTACH YOUR CV


You may attach up to 2 supporting documents to this application.

 ATTACH SUPPORTING DOCUMENT

YOU MUST SUPPLY AT LEAST 2 ROWS FOR REFEREES

 BACK

 SAVE DRAFT

SUBMIT APPLICATION 

A pop box will appear, asking if you want to update your saved application for the next time you may apply for another Vacancy.

Do you want to update your saved application for the next time you may apply for another vacancy?

YES NO

The I Frame and Application Form part of the process are now complete.

Thank you message as below confirms successful submission of application form.

### THANK YOU

We are pleased to confirm that your application was submitted successfully. You can view the details of your application via the [dashboard](#).

## HR Portal – Candidates

Line Managers now control several routes available for the Candidate after applying for the Vacancy, and they can be moved through the below queues or stages:

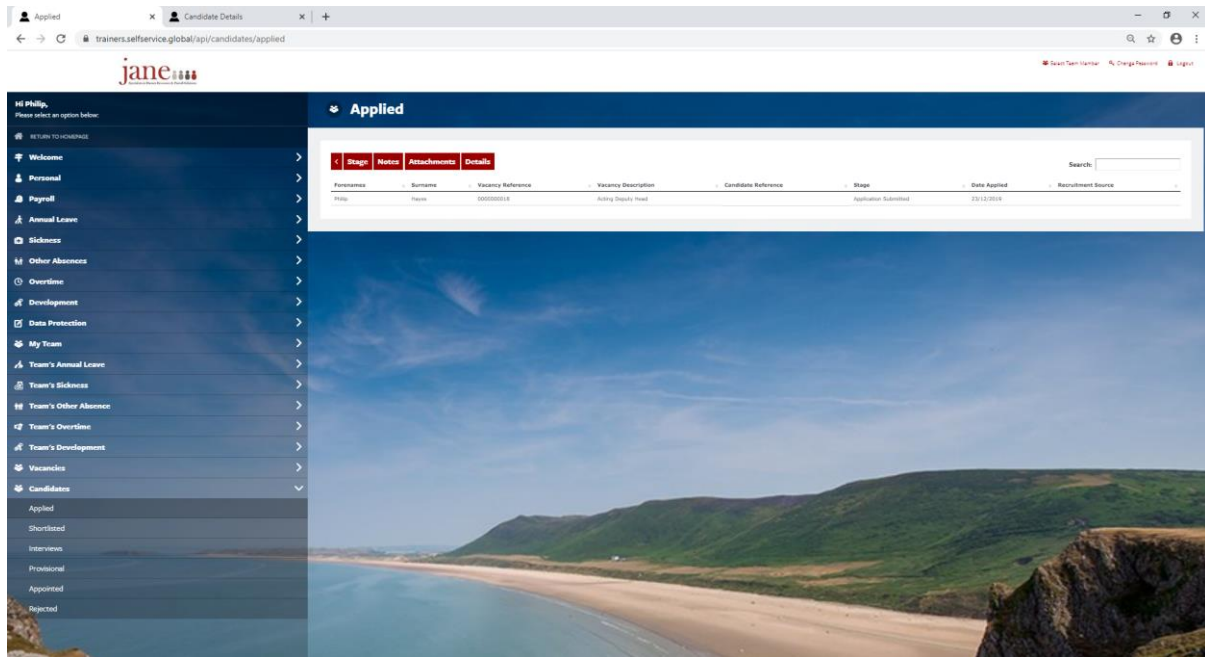
Applied, Shortlisted, Interviews, Provisional, Appointed, Rejected.



### Candidates - Applied

After applying for the Vacancy, the Candidate will appear in the Applied section of the Portal.

Highlight the Candidate to either change the Stage, add Notes, view Attachments or to view Application Details in PDF format.

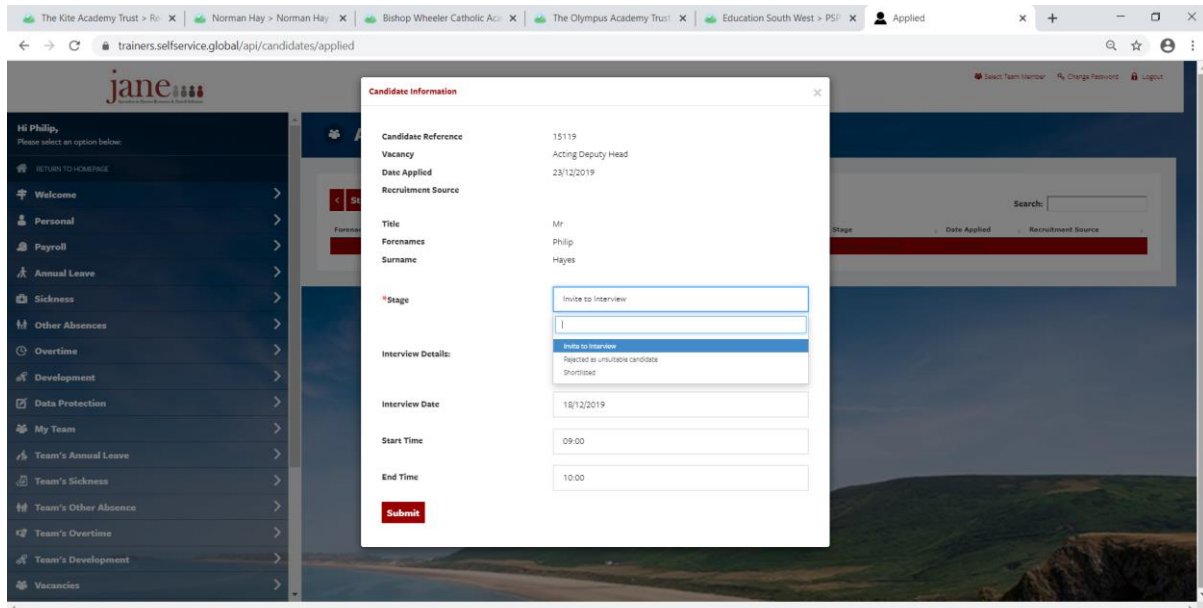


## Candidates – Applied - Stage

Select Stage to move the Candidate through the Recruitment process and the associated steps within the Portal.

A Candidate Information Summary box is returned.

After a candidate has applied, the next step is to either Invite to interview, Reject as unsuitable or Shortlist.



The screenshot shows a web browser window with the URL 'trainers.selfservice.global/api/candidates/applied'. The main page is the Jane Systems portal, and a 'Candidate Information' modal is open. The modal contains the following information:

|                     |                     |
|---------------------|---------------------|
| Candidate Reference | 15119               |
| Vacancy             | Acting Deputy Head  |
| Date Applied        | 23/12/2019          |
| Recruitment Source  |                     |
| Title               | Mr                  |
| Forenames           | Philip              |
| Surname             | Hayes               |
| *Stage              | Invite to Interview |
| Interview Details:  | Invite to Interview |
| Interview Date      | 18/12/2019          |
| Start Time          | 09:00               |
| End Time            | 10:00               |

A 'Submit' button is located at the bottom left of the modal. The background shows a sidebar with navigation options like 'Welcome', 'Personal', 'Payroll', etc., and a search bar at the top right.

## Invite to Interview

If required, complete the Interview Date and times if wish to proceed the Candidate further – see above example.

## Rejected as Unsuitable Candidate

Will remove the Candidate from the process.  
Workflows can be added at this point.

## Request References

References can be requested from those nominated on the Application Form via a Workflow.

## Shortlisted

Shortlisted moves the Candidate on as suitable for the next stage within the process.

## Candidates - Shortlisted

Staging the Candidate to Shortlisted moves them to the Shortlisted queue.

**Shortlisted**

Candidate stage changed.

< **Stage** Notes Attachments Details Search:

| Forenames | Surname | Vacancy Reference | Vacancy Description | Candidate Reference | Stage       | Date Applied | Recruitment Source |
|-----------|---------|-------------------|---------------------|---------------------|-------------|--------------|--------------------|
| Philip    | Hayes   | 0000000018        | Acting Deputy Head  |                     | Shortlisted | 23/12/2019   |                    |

Options from here are to Invite to Interview or Reject as Unsuitable Candidate.

\*Stage

Shortlisted

Interview Details:

- Invite to interview
- Rejected as unsuitable candidate
- Shortlisted**

When you stage the Candidate on to Invite to Interview, they will disappear from the Shortlisted queue.

**No Shortlisted Candidates**

No candidates have been shortlisted.

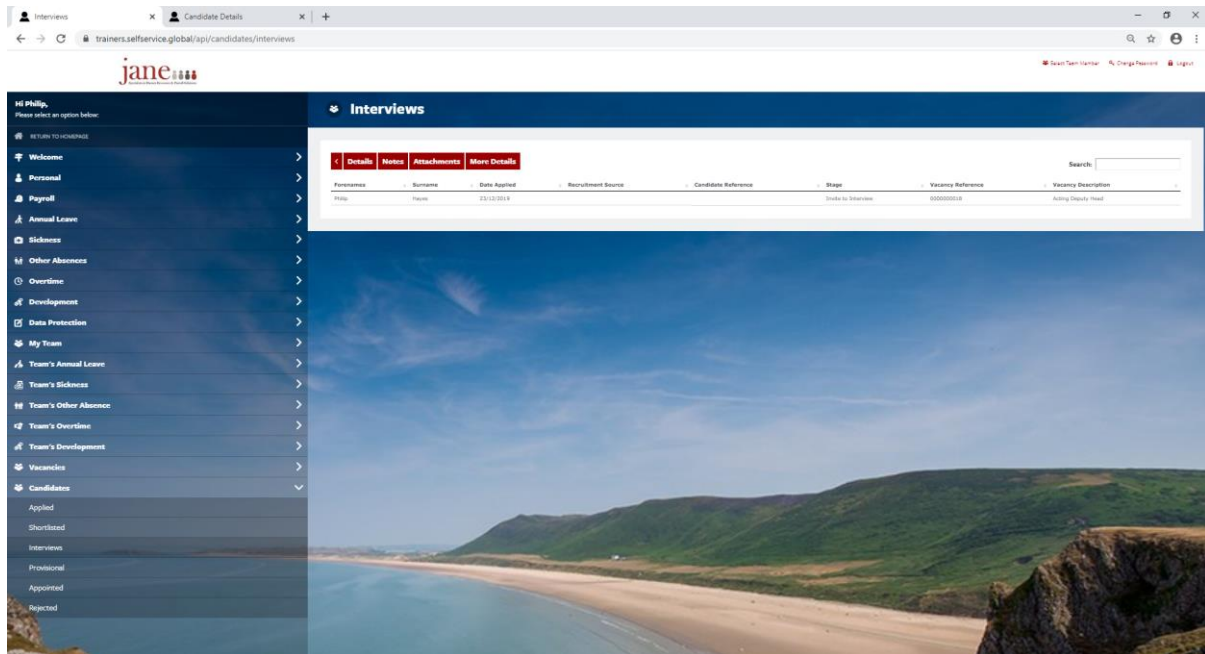
HR now need to check the interview details and then change the status to Approved for First Interview.

**Interviews**

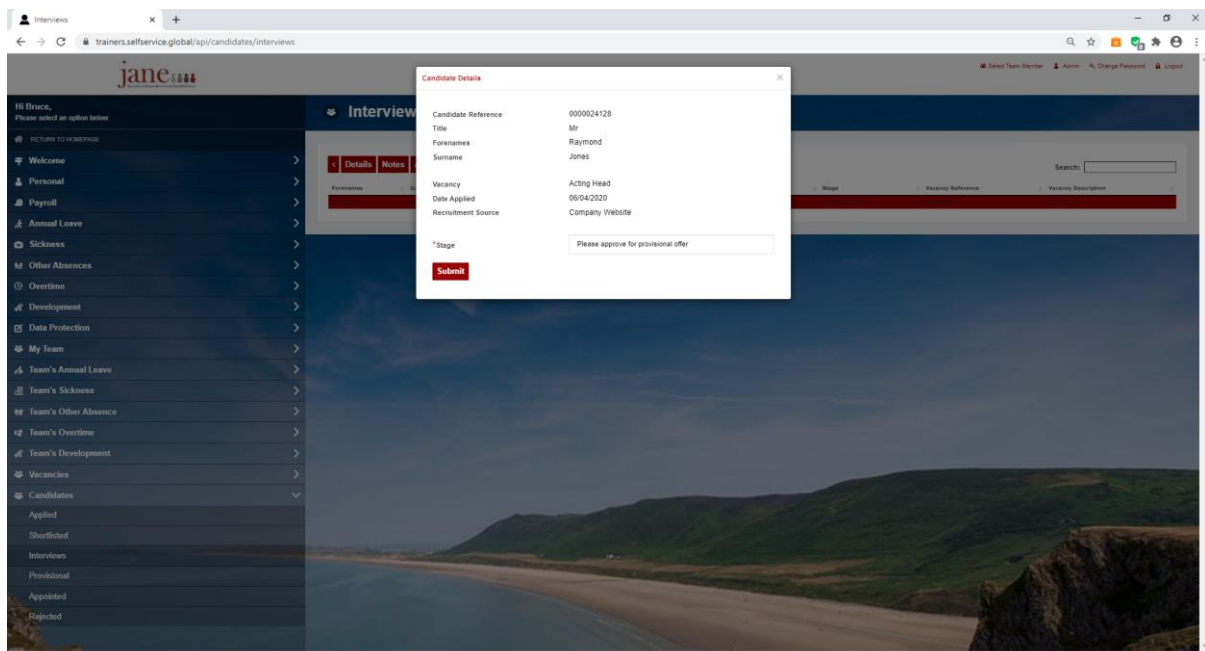
< **Details** Notes Attachments More Details Search:

| Forenames | Surname | Date Applied | Recruitment Source | Candidate Reference | Stage               | Vacancy Reference | Vacancy Description |
|-----------|---------|--------------|--------------------|---------------------|---------------------|-------------------|---------------------|
| Philip    | Hayes   | 23/12/2019   |                    |                     | Invite to Interview | 0000000018        | Acting Deputy Head  |

## Candidate – Interviews



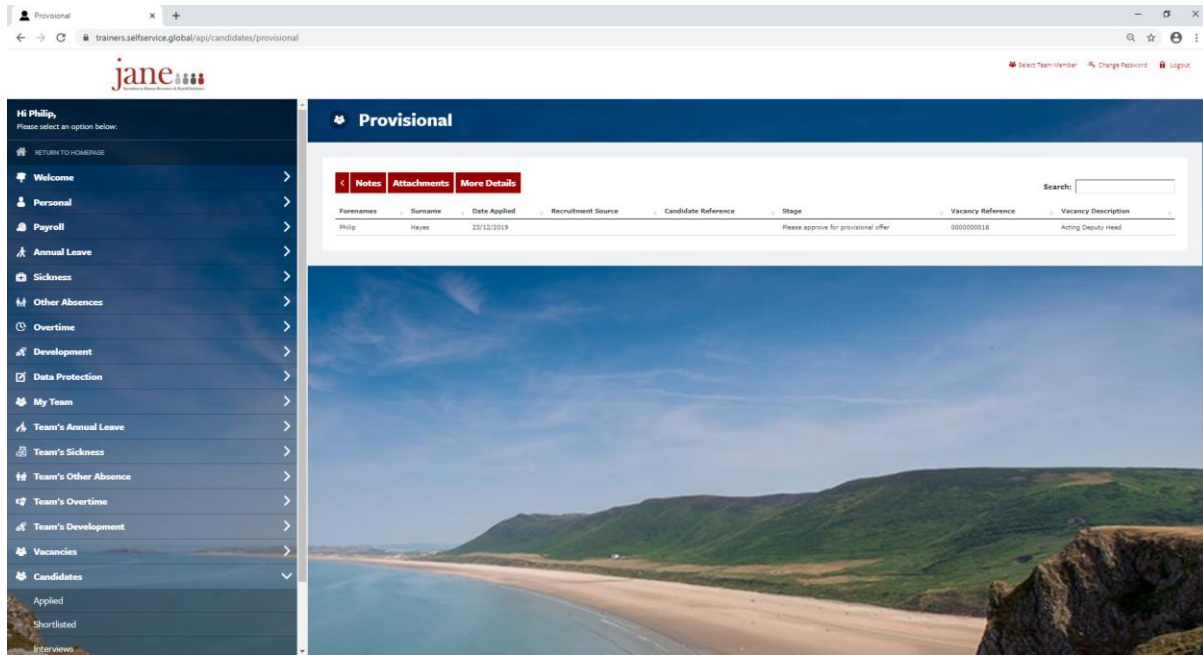
From here, select the Candidate to either Please approve for conditional offer, or Rejected after first interview.



Click Submit to make any changes.

The Candidate will disappear and will move to the Provisional or Conditional Queue if this is the desired route.





Provisional

Notes Attachments More Details

| Forenames | Surname | Date Applied | Recruitment Source | Candidate Reference | Stage                                | Vacancy Reference | Vacancy Description |
|-----------|---------|--------------|--------------------|---------------------|--------------------------------------|-------------------|---------------------|
| Philip    | Hayes   | 23/12/2019   |                    |                     | Please approve for provisional offer | 000000018         | Acting Deputy Head  |

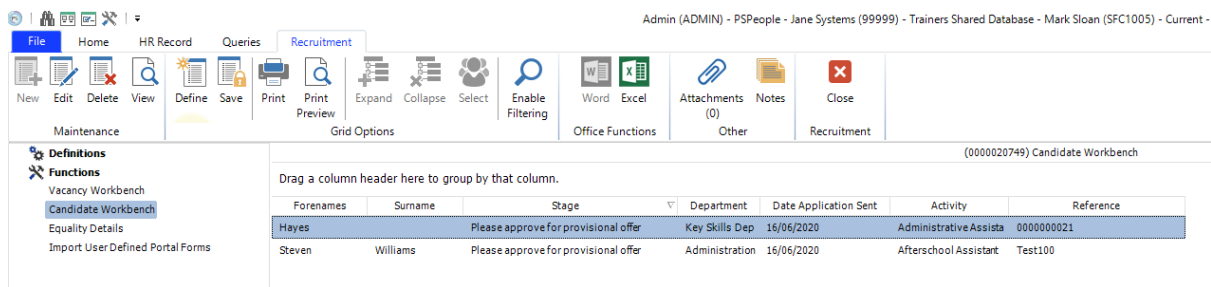
Please note at the **Interview** stage, and if the Candidate is staged to **Please Approve for Provisional Offer**, HR will need to review this in the Windows Application > **Recruitment > Candidate Workbench**

## Candidate Workbench

The next stage of the process is actioned in the Windows Application.

### Recruitment > Candidate Workbench

The HR Team now need to view the record and review the Candidate detail. If everything is OK, set the Stage to Approved for Provisional Offer.



Admin (ADMIN) - PSPeople - Jane Systems (99999) - Trainers Shared Database - Mark Sloan (SFC1005) - Current -

File Home HR Record Queries Recruitment

New Edit Delete View Define Save Print Print Preview Expand Collapse Select Enable Filtering Word Excel Attachments (0) Notes Close

Maintenance Grid Options Office Functions Other Recruitment

Definitions Functions

Vacancy Workbench

Candidate Workbench

Equality Details

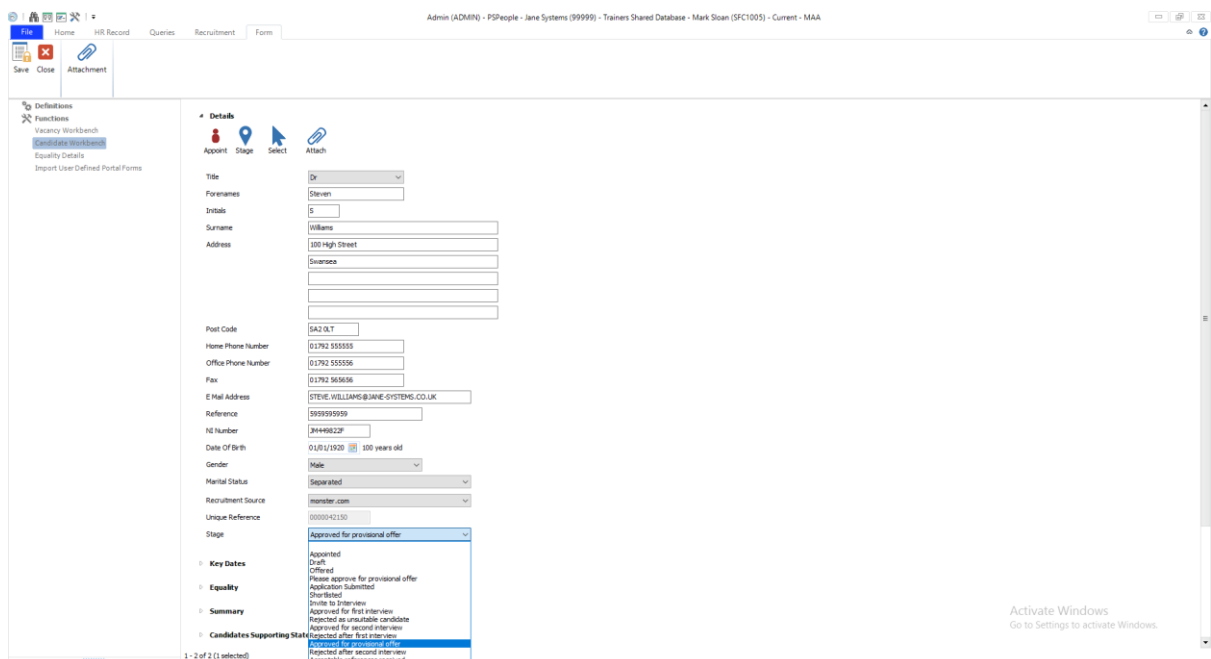
Import User Defined Portal Forms

(0000020749) Candidate Workbench

Drag a column header here to group by that column.

| Forenames | Surname  | Stage                                | Department     | Date Application Sent | Activity               | Reference  |
|-----------|----------|--------------------------------------|----------------|-----------------------|------------------------|------------|
| Hayes     |          | Please approve for provisional offer | Key Skills Dep | 16/06/2020            | Administrative Assista | 0000000021 |
| Steven    | Williams | Please approve for provisional offer | Administration | 16/06/2020            | Afterschool Assistart  | Test100    |

Stage now set to Approved for Provisional offer. This can trigger Workflow derived Contracts and Offer Letters if configured.



Admin (ADMIN) - PSPeople - Jane Systems (99999) - Trainers Shared Database - Mark Sloan (SFC1005) - Current - MAA

File Home HR Record Queries Recruitment Form

Save Close Attachment

Definitions Functions

Vacancy Workbench

Candidate Workbench

Equality Details

Import User Defined Portal Forms

Details

Appoint Stage Select Attach

Title Dr

Forenames Steven

Initials S

Surname Williams

Address 100 High Street

Spouse

Post Code SA2 8LT

Home Phone Number 01792 555555

Office Phone Number 01792 555556

Fax 01792 563636

E Mail Address STEVE.WILLIAMS@JANE-SYSTEMS.CO.UK

Reference 999999999

N Number 28449822F

Date Of Birth 01/01/1920 100 years old

Gender Male

Marital Status Separated

Recruitment Source monster.com

Unique Reference 0000042130

Stage Approved for provisional offer

Key Dates

- Appointed
- Draft
- Offer
- Please approve for provisional offer
- Application Submitted
- Shortlisted
- Invite to interview
- Approved for first interview
- Rejected as unsuitable candidate
- Approved for second interview
- Rejected after first interview
- Approved for provisional offer
- Approved after second interview
- Acceptable references required

Equality

Summary

Candidates Supporting Status

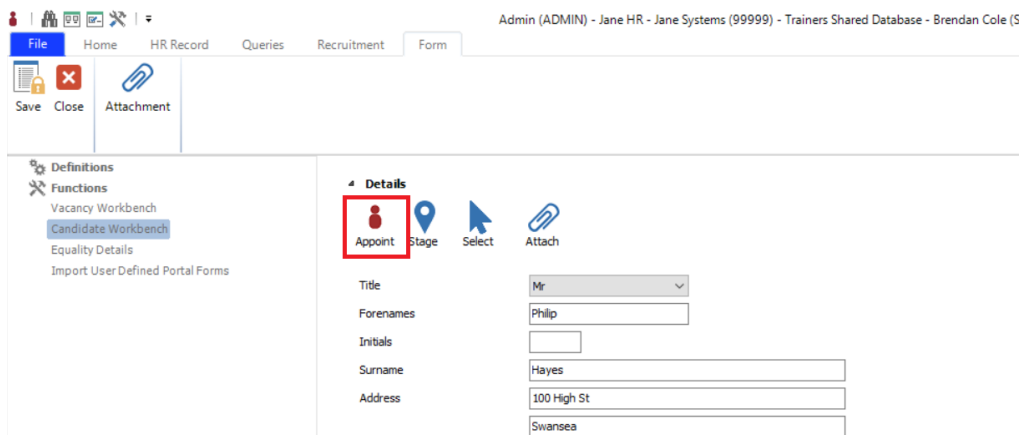
1 - 2 of 2 (1 selected)

Activate Windows  
Go to Settings to activate Windows.

## Appoint Candidate

Once the Candidate has been Approved for Provisional Offer, the HR Team can Appoint the Candidate when they are ready to do so.

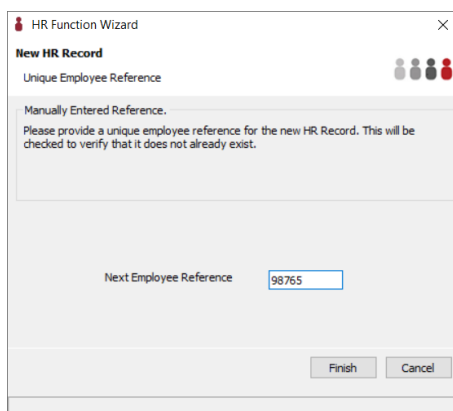
Edit the Candidate from within the Candidate Workbench and navigate to the Details section and click the **Appoint** Button.



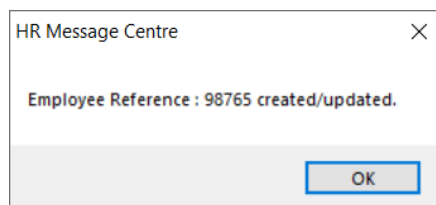
The screenshot shows a web application interface. At the top, there is a navigation bar with tabs for 'File', 'Home', 'HR Record', 'Queries', 'Recruitment', and 'Form'. Below this is a toolbar with 'Save', 'Close', and 'Attachment' buttons. On the left, a sidebar lists 'Definitions' and 'Functions', with 'Candidate Workbench' selected. The main area is titled 'Details' and contains four buttons: 'Appoint' (highlighted with a red box), 'Stage', 'Select', and 'Attach'. Below the buttons are form fields for 'Title' (Mr), 'Forenames' (Philip), 'Initials' (empty), 'Surname' (Hayes), and 'Address' (100 High St, Swansea).

Clicking Appoint activates the HR Function Wizard where users can enter a new Employee Reference number. The wizard will also be presented if Employee Reference auto generate is switched on. If you do not enter a number here, the Wizard will default to the next available employee number.

A message is returned advising successful Employee Reference record creation.



The 'HR Function Wizard' dialog box is titled 'New HR Record' and 'Unique Employee Reference'. It contains a text area with the instruction: 'Manually Entered Reference. Please provide a unique employee reference for the new HR Record. This will be checked to verify that it does not already exist.' Below this is a text input field labeled 'Next Employee Reference' containing the value '98765'. At the bottom are 'Finish' and 'Cancel' buttons.



The 'HR Message Centre' dialog box displays the message: 'Employee Reference : 98765 created/updated.' and has an 'OK' button at the bottom.

The basic details used when applying for the Vacancy will be pulled through, i.e. Personal details, Qualifications etc.

## Portal Functionality – Candidates

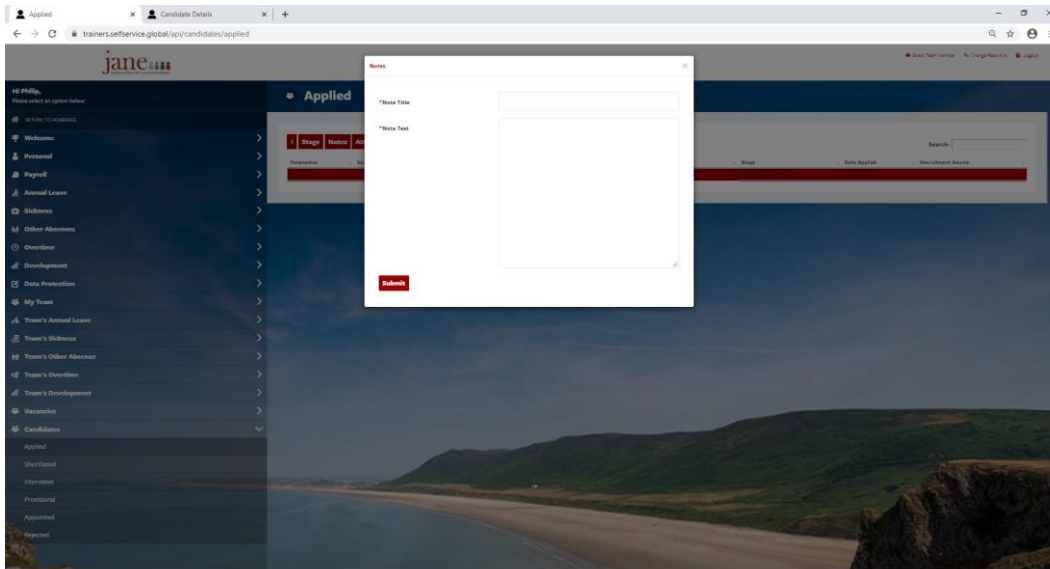
The following functionality is available when managing Candidates within the Portal. Select the Candidate row to activate functionality



### Notes

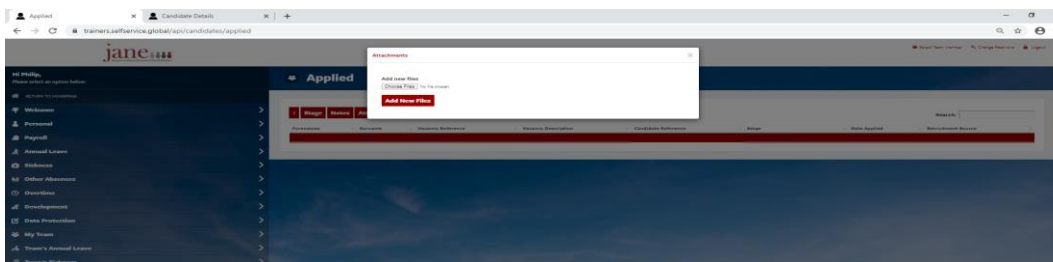
A free format text area is available and can be used to add any information relating to the Candidate. This information is not visible to the Candidate.

Select the **Candidate > Notes**



### Attachments

Select the **Candidate > Attachments > View or Add New Files** to attach files to the Candidate

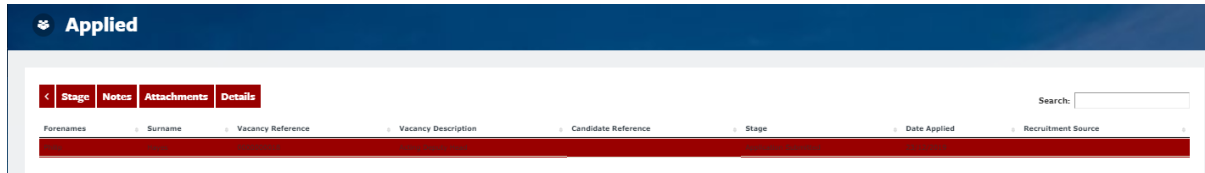




## Details

A Candidate Details Summary PDF is available, example as below.

Select the Candidate > Details



A PDF is presented which can be printed off.

The fields are configurable.

### Candidate Details



|                            |                    |
|----------------------------|--------------------|
| <b>Candidate Reference</b> | 15119              |
| <b>Vacancy</b>             | Acting Deputy Head |
| <b>Date Applied</b>        | 23/12/2019         |
| <b>Recruitment Source</b>  |                    |

#### Personal Details

---

---

|                  |                        |
|------------------|------------------------|
| <b>Title</b>     | Mr                     |
| <b>Forenames</b> | Philip                 |
| <b>Surname</b>   | Hayes                  |
| <b>Address</b>   | 100 High St<br>Swansea |

|                  |         |
|------------------|---------|
| <b>Post Code</b> | SA2 0LT |
|------------------|---------|

#### Interview Details

---

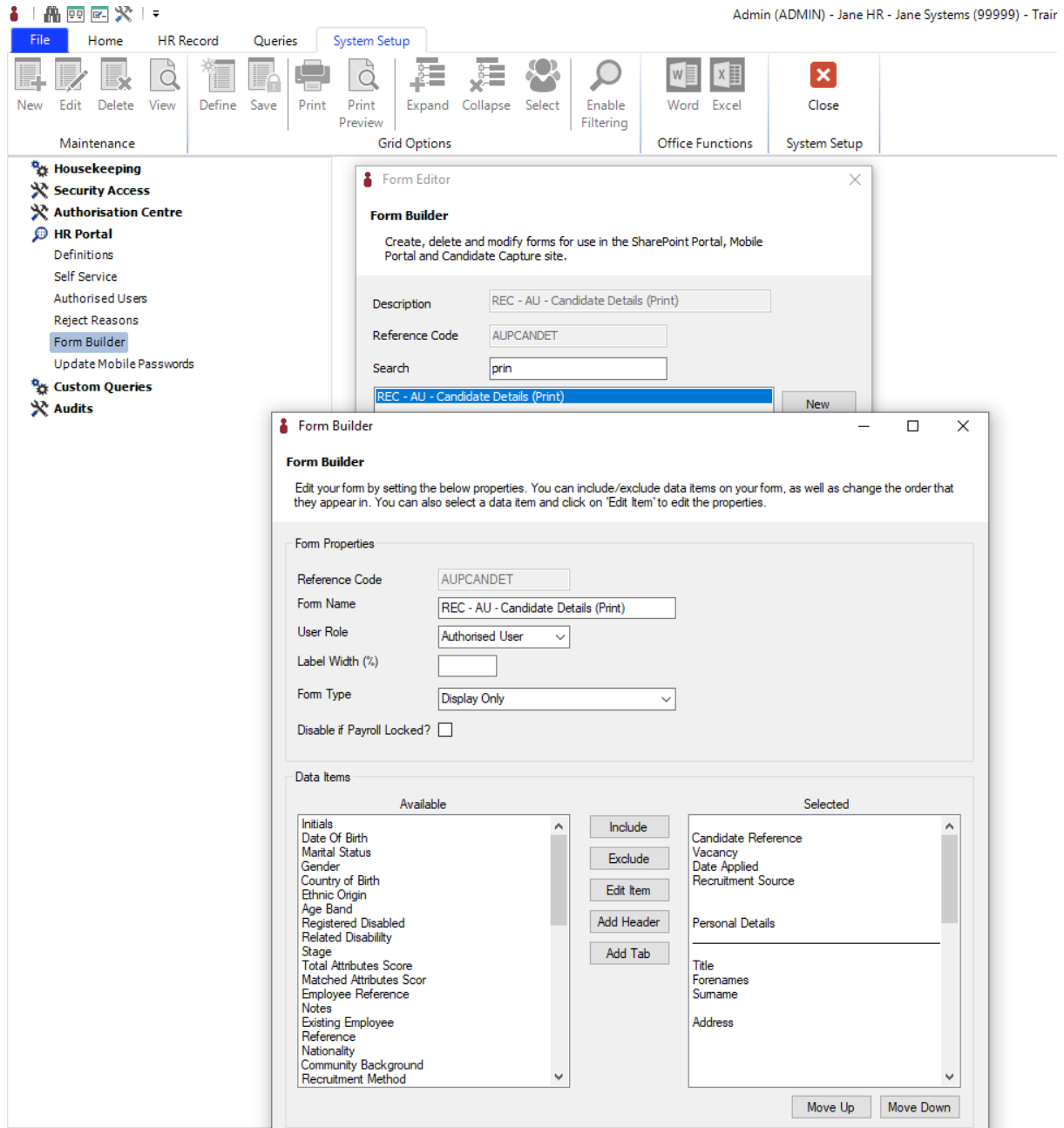
---

|                       |            |
|-----------------------|------------|
| <b>Interview Date</b> | 18/12/2019 |
| <b>Start Time</b>     | 09:00      |
| <b>End Time</b>       | 10:00      |

The details present on the Candidate Summary PDF are configurable and can be amended by PSP using Form Builder.

## System Setup > HR Portal > Form Builder > Form Name

Move desired fields over from **Available** to **Selected**.



The screenshot displays the 'Form Builder' application interface. At the top, there is a navigation pane on the left with categories like 'Housekeeping', 'Security Access', 'Authorisation Centre', 'HR Portal', 'Custom Queries', and 'Audits'. The 'HR Portal' section is expanded, showing 'Form Builder' as the active item. The main workspace contains a 'Form Editor' window and a larger 'Form Builder' window. The 'Form Editor' window shows the form's description, reference code (AUPCANDET), and search criteria. The 'Form Builder' window is the primary focus, showing 'Form Properties' (Reference Code: AUPCANDET, Form Name: REC - AU - Candidate Details (Print), User Role: Authorised User, Label Width (%): empty, Form Type: Display Only) and 'Data Items'. The 'Data Items' section is divided into 'Available' and 'Selected' lists. The 'Available' list includes fields like Initials, Date Of Birth, Marital Status, Gender, Country of Birth, Ethnic Origin, Age Band, Registered Disabled, Related Disability, Stage, Total Attributes Score, Matched Attributes Scor, Employee Reference, Notes, Existing Employee, Reference, Nationality, Community Background, and Recruitment Method. The 'Selected' list includes Candidate Reference, Vacancy, Date Applied, Recruitment Source, Personal Details, Title, Forenames, Surname, and Address. Buttons for 'Include', 'Exclude', 'Edit Item', 'Add Header', and 'Add Tab' are positioned between the two lists. 'Move Up' and 'Move Down' buttons are at the bottom of the 'Selected' list.

## **Additional Information and Functionality**

### **Workflows**

A workflow is an automated process built into the system that frees up your time and gives you an auditable record of activity. Recruitment workflows help you maintain a record of recruitment activity, keeping candidates informed and setting triggers for appropriate action at whatever stage of the process you choose.

### **Workflow > Processes**

Selecting the Processes option in the Workflow module will display the maintenance screen listing all the existing workflow processes showing their code and description. From here new Workflows can also be added.

The workflow module uses the term Workflow Process to describe the procedure which triggers the first action to be performed.

### **Workflow > Actions**

The term Workflow Action is used to describe the operation which is to be performed when the process occurs. This could be something like sending an email, producing a Word document such as a letter.

Please refer to attached for further information regarding Workflows.



2. Workflow  
Training (2).pdf

By default, the Recruitment module provides the below Workflows as standard.

**Vacancy**

|               |                 |                       |  |
|---------------|-----------------|-----------------------|--|
| Submission of | Vacancy Request | notification email to | HR team                                |
| Approval of   | Vacancy Request | notification email to | Requester                              |
| Decline of    | Vacancy Request | notification email to | Requester                              |
| Closing       | within 3 days   | notification email to | All candidates with draft applications |

**Candidate**

|                    |  |                       |           |
|--------------------|--|-----------------------|-----------|
| Submission of      | Job Application                          | notification email to | Candidate |
| Change of stage to | approved for first interview             | notification email to | Candidate |
| Change of stage to | approved for first interview             | notification email to | Candidate |
| Change of stage to | approved for second interview            | notification email to | Candidate |
| Change of stage to | approved for provisional offer           | notification email to | Candidate |
| Change of stage to | references requested                     | notification email to | Referees  |
| Change of stage to | acceptable references received           | notification email to | Candidate |
| Change of stage to | acceptable references not rec'd          | notification email to | Candidate |
| Change of stage to | Rejected after 1 <sup>st</sup> interview | notification email to | Candidate |
| Change of stage to | Rejected after 2nd interview             | notification email to | Candidate |
| Change of stage to | Rejected as unsuitable                   | notification email to | Candidate |

Jane Systems / PSP can provide Workflow training upon request.

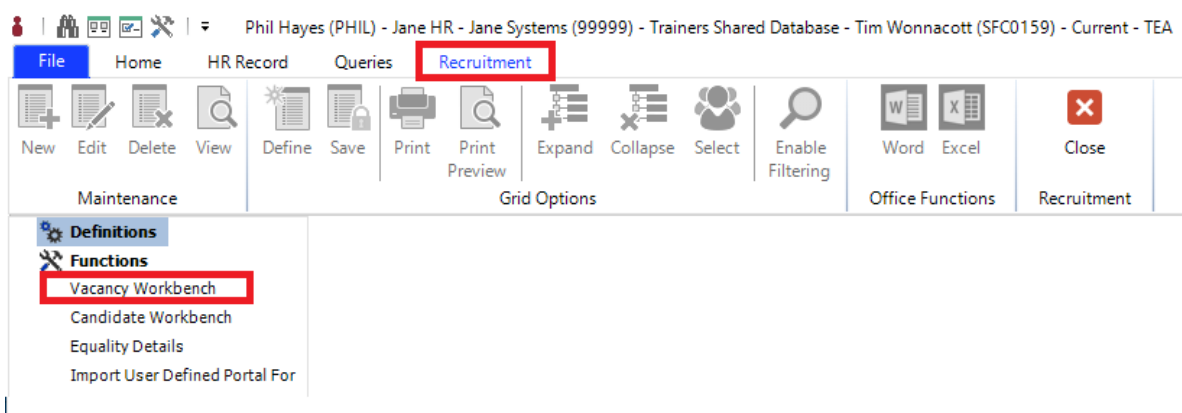


## The Vacancy Workbench

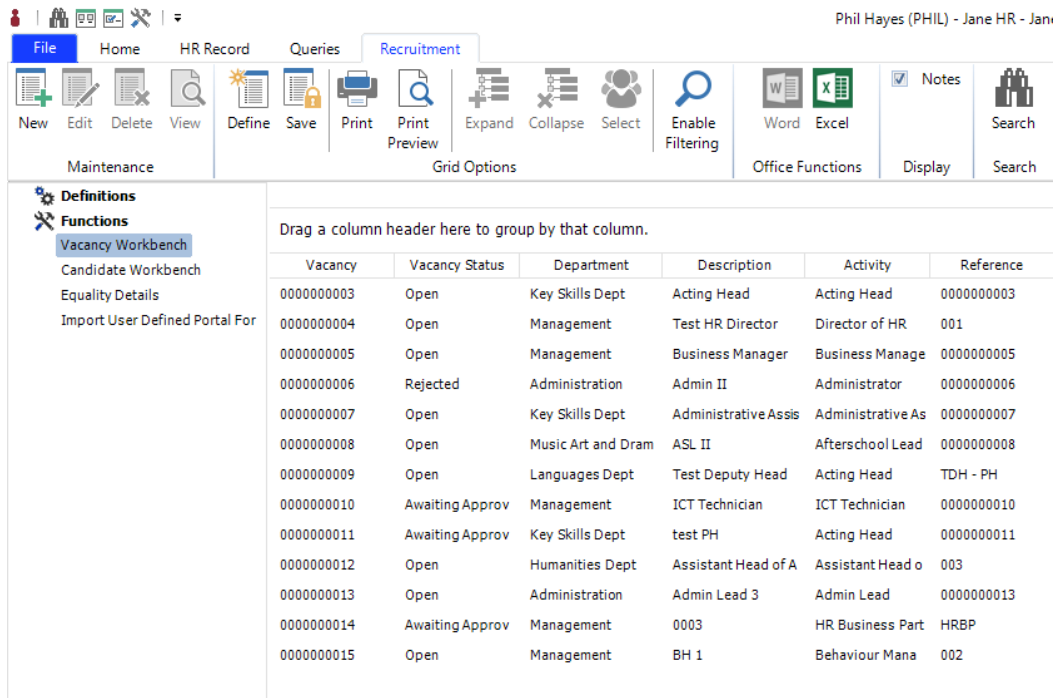
### Recruitment > Vacancy Workbench

The Vacancy Workbench area provides the Recruitment Team with a snapshot, status, and inventory of all current Vacancies. Vacancies can either be generated through the Portal by a Line Manager or added directly into the Vacancy Workbench by the HR Recruitment team who have access to PSP.

Both entry points have the same desired outcome - generating a live Vacancy on the careers section of your website.



All Vacancies will appear in the **Vacancy Workbench**.



Phil Hayes (PHIL) - Jane HR - Jan

File Home HR Record Queries Recruitment

New Edit Delete View Define Save Print Print Preview Expand Collapse Select Enable Filtering Word Excel Notes Search

Maintenance Grid Options Office Functions Display Search

Definitions  
Functions  
Vacancy Workbench  
Candidate Workbench  
Equality Details  
Import User Defined Portal For

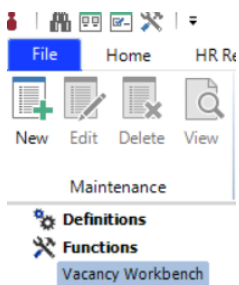
Drag a column header here to group by that column.

| Vacancy    | Vacancy Status  | Department         | Description          | Activity          | Reference  |
|------------|-----------------|--------------------|----------------------|-------------------|------------|
| 0000000003 | Open            | Key Skills Dept    | Acting Head          | Acting Head       | 0000000003 |
| 0000000004 | Open            | Management         | Test HR Director     | Director of HR    | 001        |
| 0000000005 | Open            | Management         | Business Manager     | Business Manage   | 0000000005 |
| 0000000006 | Rejected        | Administration     | Admin II             | Administrator     | 0000000006 |
| 0000000007 | Open            | Key Skills Dept    | Administrative Assis | Administrative As | 0000000007 |
| 0000000008 | Open            | Music Art and Dram | ASL II               | Afterschool Lead  | 0000000008 |
| 0000000009 | Open            | Languages Dept     | Test Deputy Head     | Acting Head       | TDH - PH   |
| 0000000010 | Awaiting Approv | Management         | ICT Technician       | ICT Technician    | 0000000010 |
| 0000000011 | Awaiting Approv | Key Skills Dept    | test PH              | Acting Head       | 0000000011 |
| 0000000012 | Open            | Humanities Dept    | Assistant Head of A  | Assistant Head o  | 003        |
| 0000000013 | Open            | Administration     | Admin Lead 3         | Admin Lead        | 0000000013 |
| 0000000014 | Awaiting Approv | Management         | 0003                 | HR Business Part  | HRBP       |
| 0000000015 | Open            | Management         | BH 1                 | Behaviour Mana    | 002        |

## Adding a Vacancy from the Windows Application

A new Vacancy can also be added directly into the Windows Application by the HR Team, circumventing the Portal if required. To generate a new Vacancy:

### Recruitment > Vacancy Workbench > New



File Home HR Record

New Edit Delete View

Maintenance

Definitions  
Functions  
Vacancy Workbench

Click on **New** and a blank Vacancy form will be presented for completion.



4 Details

|                       |  |
|-----------------------|--|
| Vacancy               | <input type="text"/>                                   |
| Reference             | <input type="text"/>                                   |
| Vacancy Status        | <input type="text" value=""/>                          |
| Activity              | <input type="text" value=""/> ... <input type="text"/> |
| Post Reference        | <input type="text"/>                                   |
| Department            | <input type="text" value=""/> ... <input type="text"/> |
| Location              | <input type="text" value=""/> ... <input type="text"/> |
| Cost Centre           | <input type="text" value=""/> ... <input type="text"/> |
| Salary Grade          | <input type="text" value=""/> ... <input type="text"/> |
| Whole Time Equivalent | <input type="text" value=""/>                          |
| Scale Point           | <input type="text" value=""/>                          |
| Hours                 | <input type="text"/>                                   |
| Weeks Per Year        | <input type="text"/>                                   |
| WTE Factor            | <input type="text"/>                                   |
| Minimum Salary        | <input type="text"/>                                   |
| Maximum Salary        | <input type="text"/>                                   |

Complete the form up to but not including **Stages** then save the vacancy and close. Then click on vacancy workbench and the new vacancy will appear.

4 Details

|                       |  |  |
|-----------------------|--|--|
| Vacancy               | <input type="text" value="000000004"/>             | <input type="text" value="HR Manager"/>              |
| Reference             | <input type="text" value="HRM1408"/>               |  |
| Vacancy Status        | <input type="text" value="Vacant"/>                |  |
| Activity              | <input type="text" value="942BE"/>                 | ... <input type="text" value="Personnel Manager"/>   |
| Post Reference        | <input type="text" value="HM1408"/>                |  |
| Department            | <input type="text" value="DH"/>                    | ... <input type="text" value="Director of Housing"/> |
| Location              | <input type="text" value="CITY"/>                  | ... <input type="text" value="Central Office"/>      |
| Cost Centre           | <input type="text" value="FA"/>                    | ... <input type="text" value="Administration"/>      |
| Salary Grade          | <input type="text" value="S5"/>                    | ... <input type="text" value="Admin Scale 5"/>       |
| Whole Time Equivalent | <input type="text" value="Full-time (Permanent)"/> |  |
| Scale Point           | <input type="text" value=""/>                      |  |
| Hours                 | <input type="text" value="37.50000"/>              |  |
| Weeks Per Year        | <input type="text" value="52.00000"/>              |  |
| WTE Factor            | <input type="text" value="0"/>                     |  |
| Minimum Salary        | <input type="text" value="35000"/>                 |  |
| Maximum Salary        | <input type="text" value="40000"/>                 |  |

## Key Dates

The entries in **Key Dates** need to be accurate because the data will be used to create a new employee record for the successful candidate.

**Key Dates**

|                     |            |
|---------------------|------------|
| Approved            | 09/07/2018 |
| Advertised          | 09/07/2018 |
| Closing Date        | 23/07/2018 |
| Interviews          | 30/07/2018 |
| Date Filled         | __/__/__   |
| Appointment Date    | __/__/__   |
| Contract Start Date | __/__/__   |
| Contract End Date   | __/__/__   |

## Other Characteristics

You can attach further Characteristics to the Vacancy here, such as Employment Status, Contract Type etc.

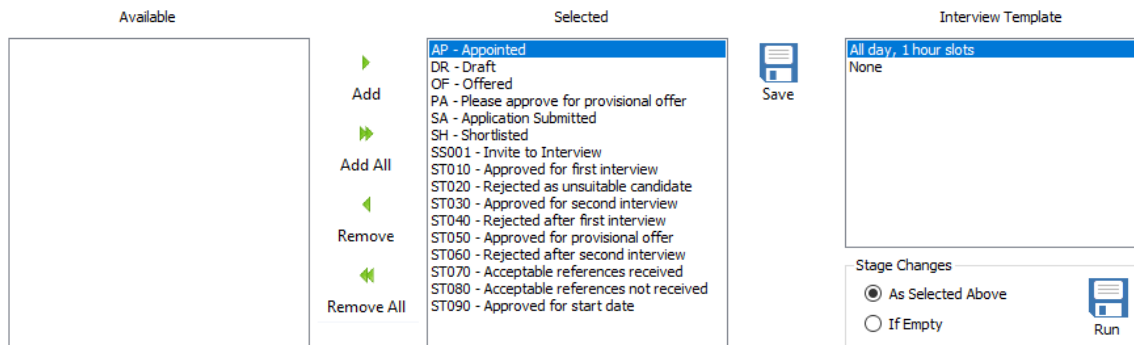
**Other Characteristics**

|                   |     |     |           |
|-------------------|-----|-----|-----------|
| Activity Category |     | ... |           |
| SOC               |     | ... |           |
| Activity Group    |     | ... |           |
| Employment Type   |     | ... |           |
| Employment Status | 10  | ... | Full Time |
| Contract Type     | PRM | ... | Permanent |

## Stages

Move all the **Stages** to the Selected section and set whatever interview stages are helpful to you. We advise moving all Stages over to **Selected**.

### 4 Stages



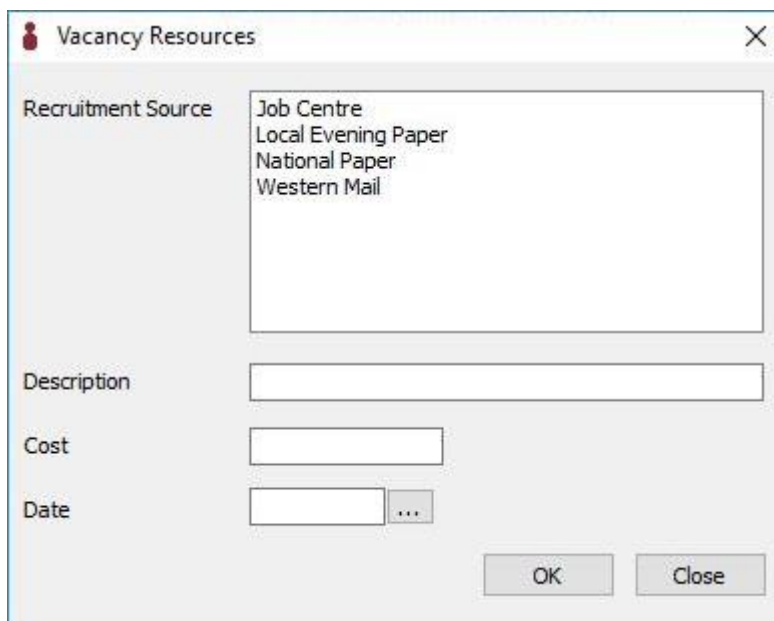
The screenshot shows a configuration window for 'Stages'. It is divided into three main sections:

- Available:** An empty box on the left.
- Selected:** A list of stages including:
  - AP - Appointed
  - DR - Draft
  - OF - Offered
  - PA - Please approve for provisional offer
  - SA - Application Submitted
  - SH - Shortlisted
  - SS001 - Invite to Interview
  - ST010 - Approved for first interview
  - ST020 - Rejected as unsuitable candidate
  - ST030 - Approved for second interview
  - ST040 - Rejected after first interview
  - ST050 - Approved for provisional offer
  - ST060 - Rejected after second interview
  - ST070 - Acceptable references received
  - ST080 - Acceptable references not received
  - ST090 - Approved for start date
- Interview Template:** A box containing 'All day, 1 hour slots' and 'None'. Below it are 'Stage Changes' options:
  - As Selected Above
  - If Empty

Navigation buttons include 'Add', 'Add All', 'Remove', 'Remove All', 'Save', and 'Run'.

## Resources

This allows you to specify and cost any advertising methods. Here we are given a choice of Job Centre, Local Evening Paper and National Paper. You can specify your own choices for these fields. You can log costs and descriptions of activity for reporting purposes.



The 'Vacancy Resources' dialog box contains the following fields and options:

- Recruitment Source:** A list box with options: Job Centre, Local Evening Paper, National Paper, Western Mail.
- Description:** A text input field.
- Cost:** A text input field.
- Date:** A date input field with a calendar icon (three dots).
- Buttons:** 'OK' and 'Close' buttons at the bottom right.

## Candidates

A Candidate can be manually attached to the Vacancy from here, if required:

4 Candidates

New Edit Delete View Attach Stage

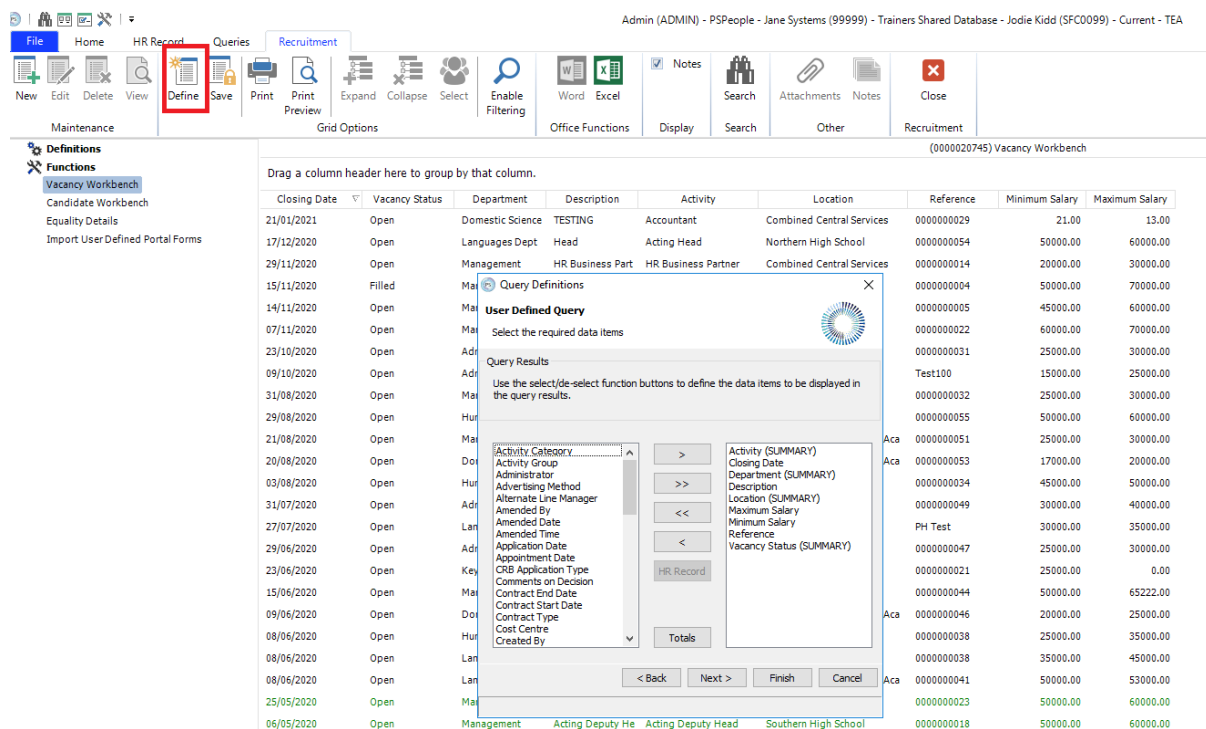
| Title | Forename | Surname |
|-------|----------|---------|
| Mrs   | Theresa  | Beer    |

## Vacancy Workbench – Defining the Grid View

Users can configure the data presented on the Vacancy Workbench, with the ability to add fields and columns to best suit the needs of daily Recruitment activity.

Click the **Define** button from within the Toolbar to tailor the view and to add or remove fields presented in the Workbench.

Use the Forward and Back arrows to add and remove fields as required. Click finish and save to apply the new fields.



The screenshot shows the 'Vacancy Workbench' application interface. The toolbar at the top contains various icons, with the 'Define' icon (a document with a pencil) highlighted by a red box. Below the toolbar is a navigation pane on the left with 'Vacancy Workbench' selected. The main area displays a data grid with columns: Closing Date, Vacancy Status, Department, Description, Activity, Location, Reference, Minimum Salary, and Maximum Salary. A 'User Defined Query' dialog box is open, allowing users to select fields to display in the query results. The dialog includes a list of available fields on the left and a list of selected fields on the right, with navigation buttons like '>', '>>', '<<', '<', and 'HR Record'. At the bottom of the dialog are buttons for '< Back', 'Next >', 'Finish', and 'Cancel'.

| Closing Date | Vacancy Status | Department       | Description      | Activity            | Location                  | Reference | Minimum Salary | Maximum Salary |
|--------------|----------------|------------------|------------------|---------------------|---------------------------|-----------|----------------|----------------|
| 21/01/2021   | Open           | Domestic Science | TESTING          | Accountant          | Combined Central Services | 000000029 | 21.00          | 13.00          |
| 17/12/2020   | Open           | Languages Dept   | Head             | Acting Head         | Northern High School      | 000000054 | 50000.00       | 60000.00       |
| 29/11/2020   | Open           | Management       | HR Business Part | HR Business Partner | Combined Central Services | 000000014 | 20000.00       | 30000.00       |
| 15/11/2020   | Filled         | Ma               |                  |                     |                           | 000000004 | 50000.00       | 70000.00       |
| 14/11/2020   | Open           | Ma               |                  |                     |                           | 000000005 | 45000.00       | 60000.00       |
| 07/11/2020   | Open           | Ma               |                  |                     |                           | 000000022 | 60000.00       | 70000.00       |
| 23/10/2020   | Open           | Ad               |                  |                     |                           | 000000031 | 25000.00       | 30000.00       |
| 09/10/2020   | Open           | Ad               |                  |                     |                           | Test100   | 15000.00       | 25000.00       |
| 31/08/2020   | Open           | Ma               |                  |                     |                           | 000000032 | 25000.00       | 30000.00       |
| 29/08/2020   | Open           | Hur              |                  |                     |                           | 000000055 | 50000.00       | 60000.00       |
| 21/08/2020   | Open           | Ma               |                  |                     |                           | 000000051 | 25000.00       | 30000.00       |
| 20/08/2020   | Open           | Do               |                  |                     |                           | 000000053 | 17000.00       | 20000.00       |
| 03/08/2020   | Open           | Hur              |                  |                     |                           | 000000034 | 45000.00       | 50000.00       |
| 31/07/2020   | Open           | Ad               |                  |                     |                           | 000000049 | 30000.00       | 40000.00       |
| 27/07/2020   | Open           | Lan              |                  |                     |                           | PH Test   | 30000.00       | 35000.00       |
| 29/06/2020   | Open           | Ad               |                  |                     |                           | 000000047 | 25000.00       | 30000.00       |
| 23/06/2020   | Open           | Key              |                  |                     |                           | 000000021 | 25000.00       | 0.00           |
| 15/06/2020   | Open           | Ma               |                  |                     |                           | 000000044 | 50000.00       | 65222.00       |
| 09/06/2020   | Open           | Do               |                  |                     |                           | 000000046 | 20000.00       | 25000.00       |
| 08/06/2020   | Open           | Hur              |                  |                     |                           | 000000038 | 25000.00       | 35000.00       |
| 08/06/2020   | Open           | Lan              |                  |                     |                           | 000000038 | 35000.00       | 45000.00       |
| 08/06/2020   | Open           | Lan              |                  |                     |                           | 000000041 | 50000.00       | 53000.00       |
| 25/05/2020   | Open           | Ma               |                  |                     |                           | 000000023 | 50000.00       | 60000.00       |
| 06/05/2020   | Open           | Management       | Acting Deputy He | Acting Deputy Head  | Southern High School      | 000000018 | 50000.00       | 60000.00       |

## Candidate Workbench

### Recruitment > Candidate Workbench

The Candidate Workbench area provides the Recruitment Team with a snapshot, status and inventory of all Candidates that have applied for Vacancies through the I Frame / online application form.

Critically, the Stage Column will provide the HR Team with an up to date status of the Candidate's application.

Admin (ADMIN) - PSPeople - Jane Systems (99999) - Trainers Shared Database - Jodie Kidd (5)

File Home HR Record Queries Recruitment

New Edit Delete View Define Save Print Print Preview Expand Collapse Select Enable Filtering Word Excel Attachments (0) Notes Close

Maintenance Grid Options Office Functions Other Recruitment

(0000020749) Candidate Workt

Definitions  
Functions  
Vacancy Workbench  
Candidate Workbench  
Equality Details  
Import User Defined Portal Forms

Drag a column header here to group by that column.

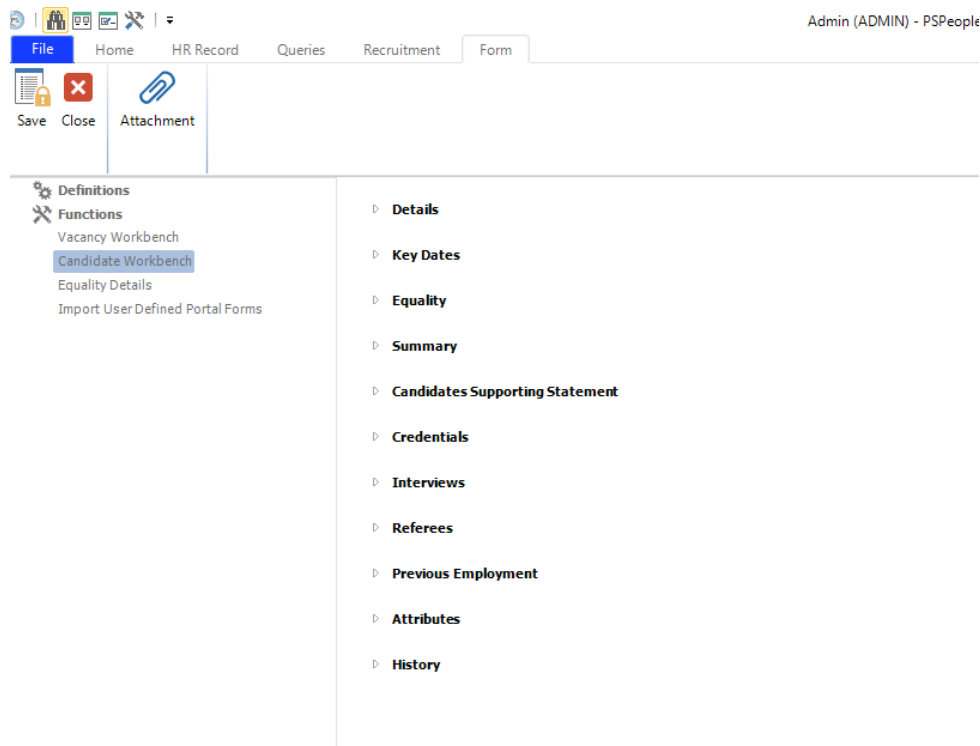
| Date Application Sent | Reference  | Forenames | Surname  | Activity                | Department     | Stage                     |
|-----------------------|------------|-----------|----------|-------------------------|----------------|---------------------------|
| 16/06/2020            | Test100    | Steven    | Williams | Afterschool Assistant   | Administration | Shortlisted               |
| 20/07/2020            | PH Test    | Hayes     |          | Acting Deputy Head      | Languages De   | Draft                     |
| 29/05/2020            | 0000000049 | Hayes     |          | Administrator - Cardiff | Administration | Approved for provisional  |
| 15/05/2020            | 0000000047 | Hayes     |          | Breakfast Club Lead     | Administration |                           |
| 28/04/2020            | 0000000041 |           |          | Acting Deputy Head      | Languages De   | Draft                     |
| 14/04/2020            | 0000000038 |           |          | Assistant Head of Aca   | Languages De   | Draft                     |
| 16/03/2020            | 0000000036 |           |          | Cover Supervisor        | Management     | Draft                     |
| 06/04/2020            | 0000000034 | Raymond   | Jones    | Acting Head             | Humanities De  | Invite to Interview       |
| 14/07/2020            | 0000000032 | Hayes     |          | Admin Lead              | Management     | Approved for provisional  |
| 07/02/2020            | 0000000027 |           |          | Acting Deputy Head      | Management     | Draft                     |
| 30/01/2020            | 0000000025 |           |          | Admin Lead              | Administration | Draft                     |
| 26/02/2020            | 0000000025 | Charlotte | Wells    | Admin Lead              | Administration | Approved for provisional  |
| 26/02/2020            | 0000000025 | Julia     | Jones    | Admin Lead              | Administration |                           |
| 26/02/2020            | 0000000025 | Leigh     | Sullivan | Admin Lead              | Administration | Appointed                 |
| 26/02/2020            | 0000000025 | Emma      | Williams | Admin Lead              | Administration | Approved for provisional  |
| 21/01/2020            | 0000000024 |           |          | Acting Head             | Management     | Draft                     |
| 16/06/2020            | 0000000021 | Hayes     |          | Administrative Assista  | Key Skills Dep | Please approve for provis |



When the Candidate applies for the position through the I Frame, the completed application form data is stored in designated sections with the Candidate Workbench area of PSP.

For example, Personal details, Equality information, Referees etc as per the data entered into the online application form.

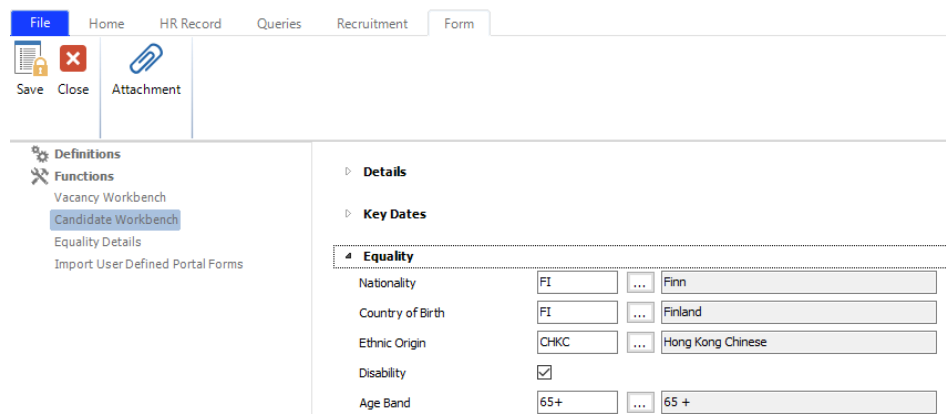
Click on the arrow to expand and present the data.



The screenshot shows the PSP interface with the 'Form' tab selected. The left sidebar contains a 'Functions' menu with 'Candidate Workbench' highlighted. The main content area displays a list of sections, each with a right-pointing arrow:

- Details
- Key Dates
- Equality
- Summary
- Candidates Supporting Statement
- Credentials
- Interviews
- Referees
- Previous Employment
- Attributes
- History

Example:



The screenshot shows the 'Form' tab with the 'Equality' section expanded. The form fields are as follows:

|                  |                                     |     |                   |
|------------------|-------------------------------------|-----|-------------------|
| Nationality      | FI                                  | ... | Finn              |
| Country of Birth | FI                                  | ... | Finland           |
| Ethnic Origin    | CHKC                                | ... | Hong Kong Chinese |
| Disability       | <input checked="" type="checkbox"/> |     |                   |
| Age Band         | 65+                                 | ... | 65 +              |

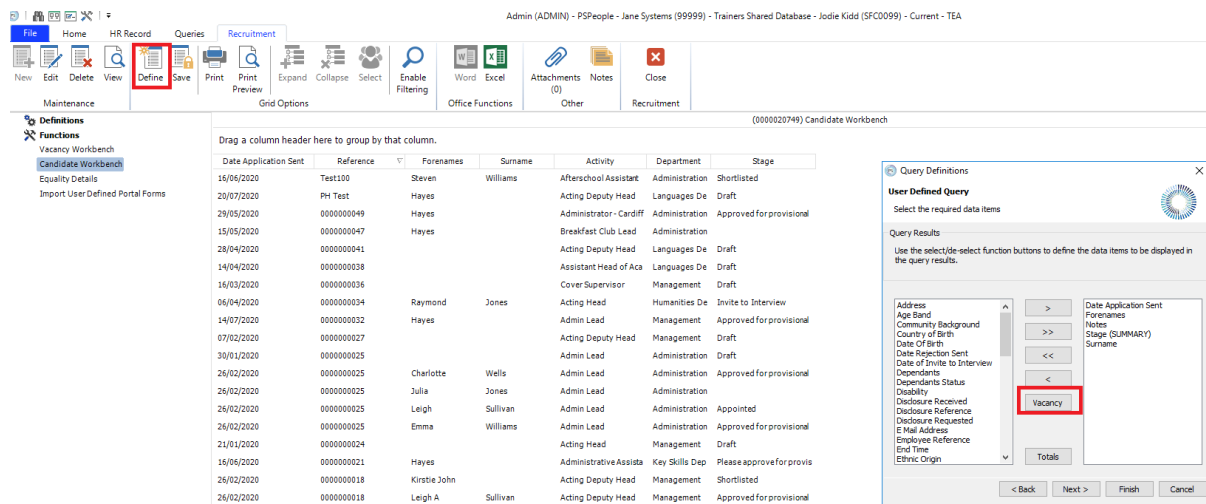
## Candidate Workbench – Defining the Grid View

Users can configure the data presented on the Candidate Workbench, with the ability to add fields and columns to best suit the needs of daily Recruitment activity.

Click the **Define** button from within the Toolbar to tailor the view and to add or remove fields presented in the Workbench.

Use the Forward and Back arrows to add and remove fields as required. Click finish and save to apply the new fields.

Click the Vacancy button to pull Vacancy related fields into the Candidate Workbench view.

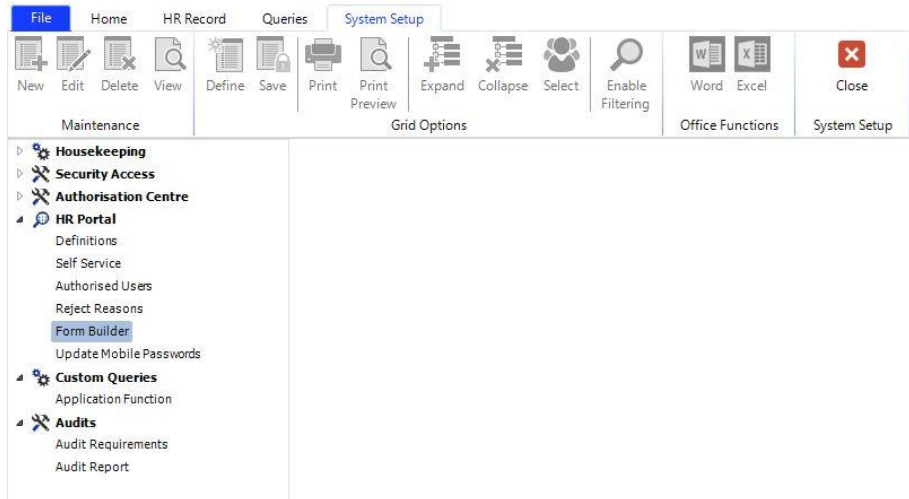


The screenshot shows the 'Candidate Workbench' interface. The toolbar at the top includes buttons for 'New', 'Edit', 'Delete', 'View', 'Define', 'Save', 'Print', 'Print Preview', 'Expand', 'Collapse', 'Select', 'Enable Filtering', 'Word', 'Excel', 'Attachments', 'Notes', and 'Close'. The 'Define' button is highlighted with a red box. Below the toolbar is a table with columns: Date Application Sent, Reference, Forenames, Surname, Activity, Department, and Stage. The table contains 20 rows of candidate data. On the right, a 'Query Definitions' dialog box is open, showing a list of fields. The 'Vacancy' field is highlighted with a red box. The dialog box also includes 'Back', 'Next', 'Finish', and 'Cancel' buttons.

| Date Application Sent | Reference | Forenames    | Surname  | Activity                | Department     | Stage                     |
|-----------------------|-----------|--------------|----------|-------------------------|----------------|---------------------------|
| 16/06/2020            | Test100   | Steven       | Williams | Afterschool Assistant   | Administration | Shortlisted               |
| 20/07/2020            | PH Test   | Hayes        |          | Acting Deputy Head      | Languages De   | Draft                     |
| 29/05/2020            | 000000049 | Hayes        |          | Administrator - Cardiff | Administration | Approved for provisional  |
| 15/05/2020            | 000000047 | Hayes        |          | Breakfast Club Lead     | Administration |                           |
| 28/04/2020            | 000000041 |              |          | Acting Deputy Head      | Languages De   | Draft                     |
| 14/04/2020            | 000000038 |              |          | Assistant Head of Aca   | Languages De   | Draft                     |
| 16/03/2020            | 000000036 |              |          | Cover Supervisor        | Management     | Draft                     |
| 06/04/2020            | 000000034 | Raymond      | Jones    | Acting Head             | Humanities De  | Invite to Interview       |
| 14/07/2020            | 000000032 | Hayes        |          | Admin Lead              | Management     | Approved for provisional  |
| 07/02/2020            | 000000027 |              |          | Acting Deputy Head      | Management     | Draft                     |
| 30/01/2020            | 000000025 |              |          | Admin Lead              | Administration | Draft                     |
| 26/02/2020            | 000000025 | Charlotte    | Wells    | Admin Lead              | Administration | Approved for provisional  |
| 26/02/2020            | 000000025 | Julia        | Jones    | Admin Lead              | Administration |                           |
| 26/02/2020            | 000000025 | Leigh        | Sullivan | Admin Lead              | Administration | Appointed                 |
| 26/02/2020            | 000000025 | Emma         | Williams | Admin Lead              | Administration | Approved for provisional  |
| 21/01/2020            | 000000024 |              |          | Acting Head             | Management     | Draft                     |
| 16/06/2020            | 000000021 | Hayes        |          | Administrative Assista  | Key Skills Dep | Please approve for provis |
| 26/02/2020            | 000000018 | Kirstie John |          | Acting Deputy Head      | Management     | Shortlisted               |
| 26/02/2020            | 000000018 | Leigh A      | Sullivan | Acting Deputy Head      | Management     | Approved for provisional  |

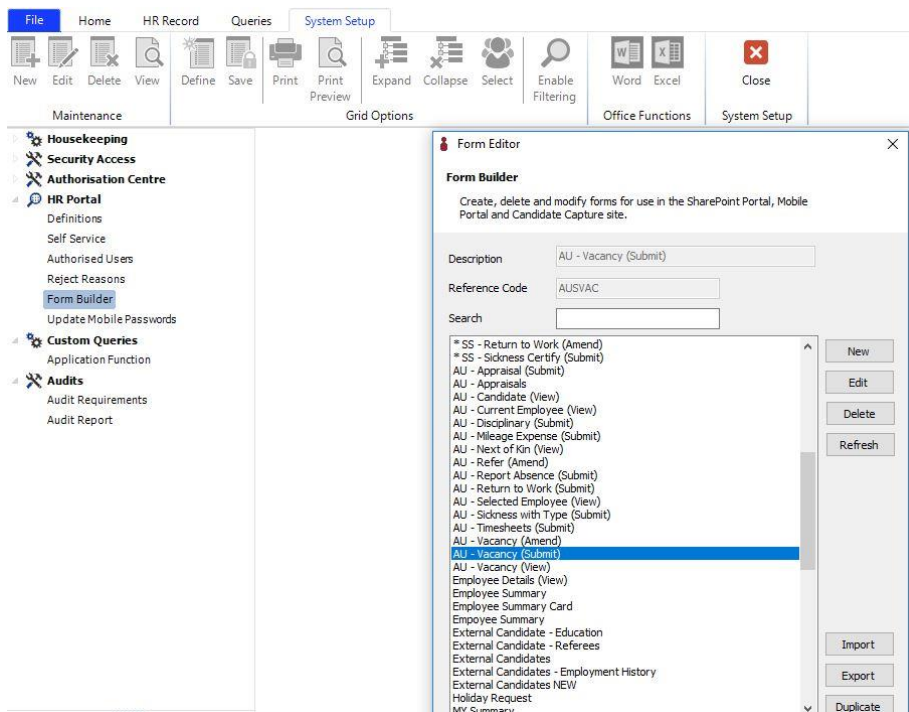
## Form Builder

Users can build Vacancy profiles by defining and prioritising applicant information. With Form Builder you can make any information request mandatory. You set the priorities for each individual vacancy.

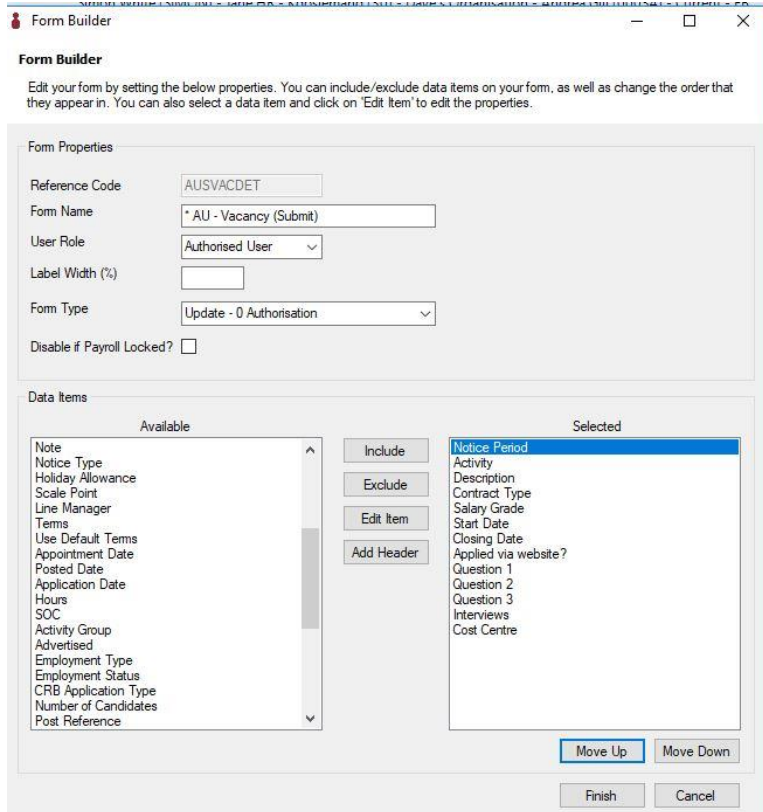


In this example an Authorised User is requesting a new vacancy

### AU – Vacancy (Submit)



By editing the form, you can change the order in which items appear and set priorities by applying mandatory status. In this case *Notice Period* has been made the lead item on the form and designated mandatory.



**Form Builder**

Edit your form by setting the below properties. You can include/exclude data items on your form, as well as change the order that they appear in. You can also select a data item and click on 'Edit Item' to edit the properties.

**Form Properties**

Reference Code: AUSVACDET

Form Name: \* AU - Vacancy (Submit)

User Role: Authorised User

Label Width (%):

Form Type: Update - 0 Authorisation

Disable if Payroll Locked?

**Data Items**

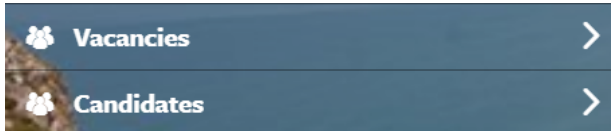
| Available            |   | Selected             |
|----------------------|---|----------------------|
| Note                 | Include<br>Exclude<br>Edit Item<br>Add Header | Notice Period        |
| Notice Type          |   | Activity             |
| Holiday Allowance    |   | Description          |
| Scale Point          |   | Contract Type        |
| Line Manager         |   | Salary Grade         |
| Terms                |   | Start Date           |
| Use Default Terms    |   | Closing Date         |
| Appointment Date     |   | Applied via website? |
| Posted Date          |   | Question 1           |
| Application Date     |   | Question 2           |
| Hours                |   | Question 3           |
| SOC                  |   | Interviews           |
| Activity Group       |   | Cost Centre          |
| Advertised           |   |                      |
| Employment Type      |   |                      |
| Employment Status    |   |                      |
| CRB Application Type |   |                      |
| Number of Candidates |   |                      |
| Post Reference       |   |                      |

Move Up Move Down

Finish Cancel

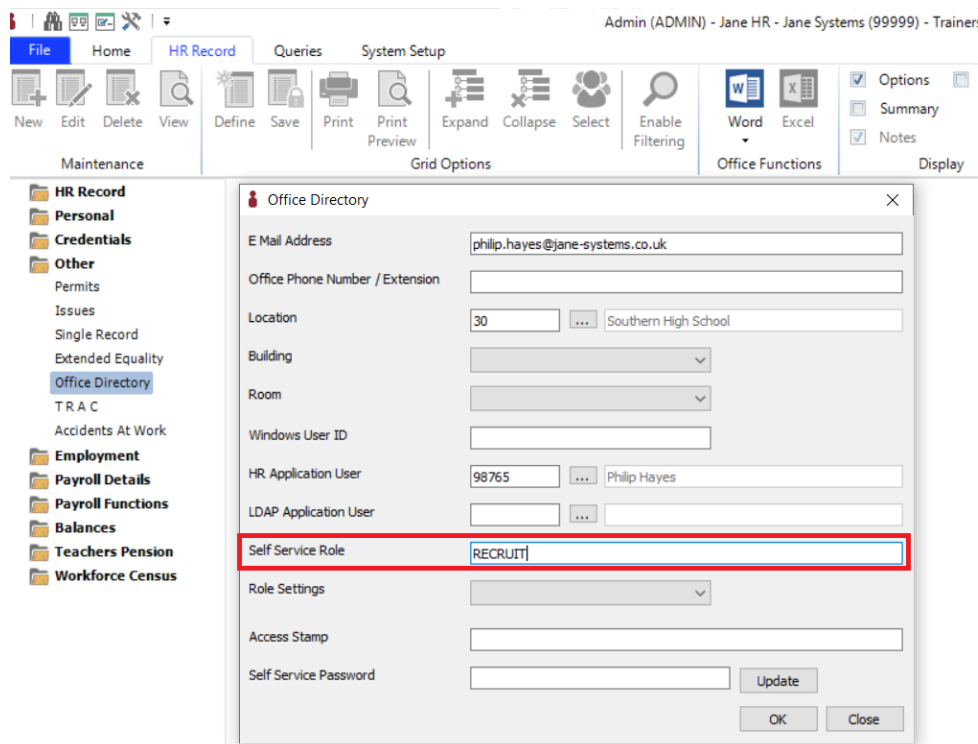
## Activating Users

In order to provide users with access to the Vacancies and Candidates functionality in the Portal, the user must be set up in the Windows Application.



HR Record > Other > Office Directory > Self Service Role > Add RECRUIT > Click OK

If using multiple Role Settings, chose the **Combine** option from the drop-down.



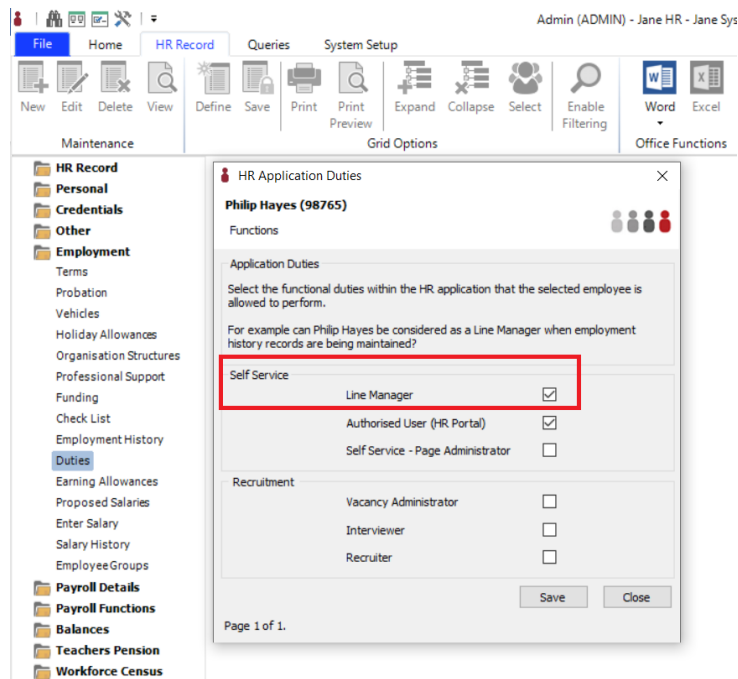
The Self-Service Password can also be updated from within the Office Directory screen.

## Line Manager Status

In order to request a Vacancy, the user must be a Line Manager.

This can be set up at:

### HR Record > Employment > Duties > Self Service > Line Manager



The screenshot shows the 'HR Application Duties' configuration window for Philip Hayes (98765). The window is titled 'HR Application Duties' and has a close button (X) in the top right corner. The user's name 'Philip Hayes (98765)' is displayed at the top. Below the name, there are three small icons representing different roles or statuses. The main content area is divided into sections: 'Application Duties', 'Self Service', and 'Recruitment'. The 'Application Duties' section contains instructions: 'Select the functional duties within the HR application that the selected employee is allowed to perform. For example can Philip Hayes be considered as a Line Manager when employment history records are being maintained?'. The 'Self Service' section has a red box around the 'Line Manager' checkbox, which is checked. Other checkboxes in this section include 'Authorised User (HR Portal)' (checked) and 'Self Service - Page Administrator' (unchecked). The 'Recruitment' section has three checkboxes: 'Vacancy Administrator' (unchecked), 'Interviewer' (unchecked), and 'Recruiter' (unchecked). At the bottom of the window, there are 'Save' and 'Close' buttons. The page number 'Page 1 of 1.' is displayed at the bottom left of the window.

## Queries

### Queries > Recruitment

There are Queries set up to support the Recruitment process.

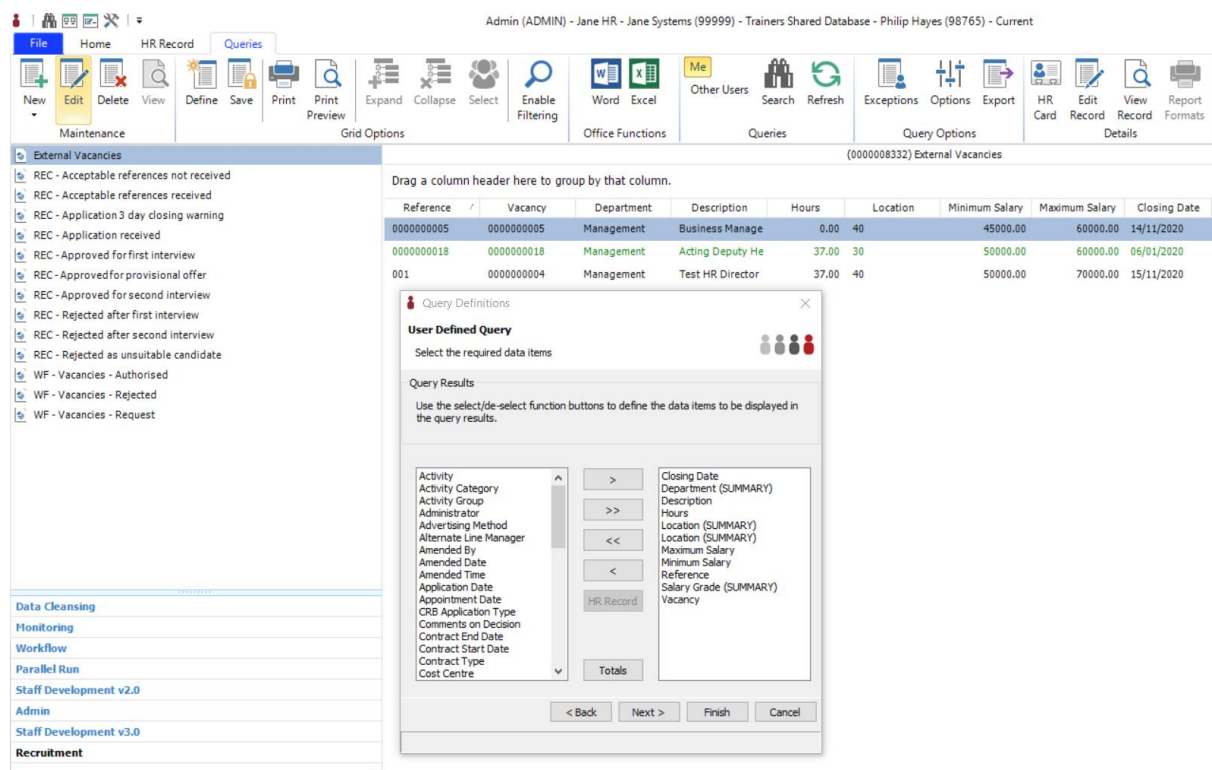
Notably, these are as follows:

### External Vacancies Query

External Vacancies will be displayed here.

Edit or Define the query to view and or change the fields.

This shows the fields that will be displayed on the I Frame.



Admin (ADMIN) - Jane HR - Jane Systems (99999) - Trainers Shared Database - Philip Hayes (98765) - Current

External Vacancies (0000008332) External Vacancies

| Reference  | Vacancy    | Department | Description      | Hours | Location | Minimum Salary | Maximum Salary | Closing Date |
|------------|------------|------------|------------------|-------|----------|----------------|----------------|--------------|
| 0000000005 | 0000000005 | Management | Business Manage  | 0.00  | 40       | 45000.00       | 60000.00       | 14/11/2020   |
| 0000000018 | 0000000018 | Management | Acting Deputy He | 37.00 | 30       | 50000.00       | 60000.00       | 06/01/2020   |
| 001        | 0000000004 | Management | Test HR Director | 37.00 | 40       | 50000.00       | 70000.00       | 15/11/2020   |

Query Definitions

User Defined Query

Select the required data items

Query Results

Use the select/de-select function buttons to define the data items to be displayed in the query results.

|                        |    |                        |
|------------------------|----|------------------------|
| Activity               | >  | Closing Date           |
| Activity Category      | >> | Department (SUMMARY)   |
| Activity Group         | << | Description            |
| Administrator          | <  | Hours                  |
| Advertising Method     | << | Location (SUMMARY)     |
| Alternate Line Manager | <  | Location (SUMMARY)     |
| Amended By             | << | Maximum Salary         |
| Amended Date           | <  | Minimum Salary         |
| Amended Time           | << | Reference              |
| Application Date       | <  | Salary Grade (SUMMARY) |
| Appointment Date       | << | Vacancy                |
| CRB Application Type   | <  |                        |
| Comments on Decision   | << |                        |
| Contract End Date      | <  |                        |
| Contract Start Date    | << |                        |
| Contract Type          | <  |                        |
| Cost Centre            | << |                        |

< Back Next > Finish Cancel

The remaining REC and WF Queries support Recruitment specific workflows.

These will be configured by Jane / PSP as part of the implementation and these should not be amended or removed by the client.

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## **Recruitment – User Acceptance Testing (UAT)**

This comprises of 2 UAT phases

Phase 1 - Application Form UAT

Phase 2 – Full Recruitment UAT

### **Phase 1 - Application Form Review**

Once your paper job application form(s) have provided, we will build online versions for candidates to use when applying for vacancies on your website. We will then provide a training session called **REC02 Application Form Review**. This is a demonstration of the configuration work completed to date, and we will show you how the vacancies are displayed on the I Frame on your website and the online version of your job application form. If multiple application forms have been provided, we will show you all of these.

We will show you how to generate new vacancies in the Windows Application and how these are fed through and displayed on the I Frame, and accessed by Candidates.

It is then over to you to test the job application form(s), and to provide us with a list of any changes which you would like using the UAT Feedback form. Any issues or change requests arising must be recorded and sent to us by the feedback deadline. Changes requested after this deadline may incur an additional charge, so it is important that you have made resources available to undertake this UAT directly following REC02.

### **Your Preparation for Launch Tasks**

You will need to complete some of these tasks to get the Recruitment module ready for launch to your employees. We suggest you do this during the UAT period while you have resources assigned to the project.

#### **1. Line Managers**

If you are using the line manager element of the portal to enable line managers to post vacancy requests, ensure that line managers have the vacancy form options you intend them to have. This is usually set by Location through Data Item Access.



## **2. Check the Workflows**

If you have the workflow module, we will have configured a set of workflows to accompany the recruitment module. You can switch these on and off individually and try them out. You can change the recipients and email content where required, making sure content has been tailored to your specific requirements. One of the key aims of the recruitment module is to help recruiters keep all parties informed at every stage via automated processes that convey exactly the messages you want to convey.

## **3. Update Data**

Update any data in the system which appears in the Recruitment module. For example, if you have been working with test vacancies and test candidates to familiarise yourself with the Vacancy Workbench and the Candidate Workbench, delete them before going live.

## **4. Website**

Liaise with your internal IT Team or web designers to provision space on your website for the iframe.

## **5. User Access**

Ensure necessary User access to the Module has been set up, with any further consideration such as permissions, groups and locations etc reviewed and set up prior to go live.

## Your Phase 1 UAT Tasks

UAT is your opportunity to review the online job application form(s) we have delivered, and we suggest you include the following tasks:

### 1. Check the I Frame

Access the demonstration URL as provided by your consultant, this will look like: <https://applicant.website/demo/yoursitehere>

The vacancies should be displayed on screen as created in the Portal or Windows Application. Check:

- Sequence of Vacancy display fields
- Look and Feel
- Consider how it will harmonize with your website

### 2. Mandatory Fields

Check the fields shown as mandatory on the form meet your requirements. These fields are denoted with a red asterisk, and candidates cannot submit an application without filling these it.

### 3. Review Tabs

Review each tab presented on the job application form(s) for completeness. Check:

- Positioning of text
- Content of text
- wording of text
- Input boxes
- Sequence of input
- Content of dropdowns
- Usability
- Look and feel

Reconcile against the paper originals to ensure everything has been captured.

#### **4. Complete and Submit the Application Form**

Complete all fields in every tab and submit the form when prompted at the end of the application. Take a note of any issues completing the form.

#### **5. Complete the UAT Feedback Form**

Please ensure you note all issues, queries and change requests on the form and return it to us by the agreed date.

**Please note that acceptable change requests do not include additional functionality. If you require further functionality to be added to your Recruitment system, please let us know and we can provide an estimate of the services required to build it.**

#### **Phase 2 - Full Recruitment UAT**

This is undertaken after the delivery of training session REC03 which will train you in the full Recruitment processing for all parties, from initial vacancy request through to appointing the successful applicant.

This UAT phase includes using the three core components: the Windows application, Portal and I Frame.

At this point the Recruitment module is handed over to you and it is your responsibility to complete user acceptance testing and your preparation tasks prior to the launch. You may wish to create a small team to help with this trial as often different people will use software differently so it may help to have some alternative opinions.

Any issues or change requests arising from UAT should be documented in the form provided and this returned to us by the agreed deadline. Please note that missing this deadline may cause other project milestones to be missed and may incur additional service charges so it is important that you complete UAT on time.

We will have resources booked to follow the feedback deadline ready to make configuration changes requested in your UAT form, correct any issues found and answer your queries.

After this there will be a short period for you to complete further UAT before you sign off the Recruitment module as delivered.

### **Your Phase 2 UAT Tasks:**

UAT is your opportunity to check the functionality we have delivered, and we suggest you include the following tasks.

#### **1. Key Functionality – Windows Application.**

Try out the Windows Application, and Review and test key functionality and features available within the Recruitment Vacancy and Candidate Workbench.

#### **2. Try out your Portal**

Spend some time trying out every aspect of your portal using the Vacancies and Candidates functionality. This will enable you to become familiar with the menus and pages and to see what it looks like with your own data.

#### **3. Requesting Vacancies**

Request Vacancies through the Windows Application and the Portal. Have a look at the fields on each portal page and check the sequence they are entered by the vacancy requester suits your way of working. Check that the vacancy request page captures all the information you need.

#### **4. Verifying Vacancies**

Review the newly created Vacancies in the Vacancy Workbench in the Windows application and in the Portal. Approve, Reject, Open and delete new Vacancies and make them live on your website.

#### **5. Documents and Job Descriptions**

Attach documents and Job Descriptions using to Vacancies using the Vacancy Workbench Toolbar.

#### **6. Review I Frame**

Check the Vacancy details being presented within the I Frame.

## **7. Viewing and applying for Vacancies**

Use the I Frame to browse for Vacancies and to and apply for roles using your online application Forms. Register for an account to do this.

## **8. Candidate Management**

Process candidates through Recruitment lifecycle stages using the Portal and Windows Application. View and print candidate details from the Portal.

## **9. Appointing**

Understand how to appoint a candidate and generate a new employee HR reference.

## **10. Try out your workflows**

The workflows are switched off when they are delivered. Look at the flow of data from one person to another and check that the notifications people receive are suitable for your organisation. You can change both the email recipients and the email content yourself, so you do not need to note these types of changes in your UAT form.

## **11. Workflow Workbench**

Workflows which fail to send for any reason, for example a missing email address, will be sent to the holding areas known as the Workflow Workbench. It is good to familiarise yourself with how this works because you will need to monitor it regularly once you are live in order to resolve problems and release any held workflows.

## **12. Complete the UAT Feedback form**

Please ensure you note all issues, queries and change requests on the form and return it to us by the agreed date.

**Please note that acceptable change requests do not include additional functionality. If you require further functionality to be added to the portal, please let us know and we can provide an estimate of the services required to build it.**

## **Outcome**

You should now be familiar with how to operate the recruitment module. Your feedback should be completed by the agreed deadline so we can make any final changes during the period pre-booked into your project. Final UAT to be completed by the sign off date.

At this point the module will be ready for you to run your first Vacancies live.

## **Recruitment Module Launch Guidelines**

The Recruitment Module provides you with a means of:

- Automating your Recruitment Process; removing paperwork and manual processes.
- Managing Vacancies and Candidates more effectively.
- Providing full control and visibility of the Recruitment process to the HR team.
- Getting jobs to market quickly, with real time links to your website.
- Ensuring that job applicants provide the information that matters to you as an employer.
- Maintaining an automated, auditable record of recruitment activity, keeping applicants and colleagues informed at every stage.

## **Recruitment - The Launch**

Once you have completed all the preparation tasks, your Recruitment module should be ready to launch. The process of how you introduce the module to your team is entirely up to you but here are some ideas which may help.

### **1. Soft Versus Full Launch**

Consider a pilot launch for a couple of Vacancies or a single location, to ensure everything is working as expected prior to a mass launch. Releasing to small numbers in batches can be easier to manage.

### **2. Training Materials**

If required, prepare user guides for all staff using the module to supplement pre and post launch induction training sessions.

### **3. Educate Your Line Managers**

Consider whether you will have a “buy in” training session for your Line Managers. This can make them into product champions and lead to them enthusiastically using the module and adapting to the procedures you lay down.

### **4. Be Prepared for Queries**

At the time of launch, it is helpful to have made some provision for questions arising about the recruitment module from the users as they become familiar with it. A “Frequently Asked Questions” document can be a useful time-saver.

## **In Scope Configuration**

### **In scope Configuration included with the standard Recruitment module:**

Application form configuration

Iframe / Job Advert

Candidate Summary PDF – accessed in the Portal for Shortlisting

Standard Workflows

Standard Stages Vacancy & Candidate

Standard Queries (Workflows and Portal)

Standard CSS:

1. Application Form Error Warnings for incomplete mandatory fields
2. “Newly added” on The I Frame / Job Advert
3. “Closing soon” on The I Frame / Job Advert
4. Colours (tabs and buttons)

### **Chargeable work available upon request**

E Teach integration

Any non-standard workflows i.e. documentation generation

Re-write of completed Application Forms

New Stages

New forms/views on the Portal