



## **iTrent Recruitment**

## **Guidance for Recruiting Managers**

DRAFT



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## **ACCESS**

Access to the recruitment module is through the People Manager iTrent login.

If you do not have this access please contact [iTrentsystemadm@york.gov.uk](mailto:iTrentsystemadm@york.gov.uk)

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## NAVIGATION

At any point you can navigate back to the homepage to the Recruitment menu options by:

- using the breadcrumb trail at the top of the screen
- clicking on the homepage icon

The screenshot displays the iTrent recruitment system interface. At the top, a breadcrumb trail is highlighted with a red oval, showing the path: **Organisation: City of York Council** > **Requisitions: HR TEAM LEADER** > **Requisition campaign summary**. Below this, there is a search bar and a table of requisitions. A callout box points to the 'HR TEAM LEADER' link in the table, stating: "Or you can click on the homepage button". Another callout box points to the breadcrumb trail, stating: "At any point you can navigate back to the homepage for the menu options by using on the breadcrumb trail at the top of the screen". The main content area shows the "Requisition campaign summary" for "HR TEAM LEADER", including details like "Requisition name", "Job title", "Requisition start date", "Requisition end date", "Application closing date", and "Published" status. It also includes a "Totals" section with "Vacancies 0", "Appointments 0", and "Applicants 4".

Requisition name	Requisition reference	Status	Start date	End date	Appli
HR TEAM LEADER	CBSS0000000	Open	03/02/2015	03/02/2015	

**Requisition campaign summary: HR TEAM LEADER**

Requisition name **HR TEAM LEADER (CBSS)**  
Job title **HR TEAM LEADER**  
Requisition start date **03/02/2015**  
Requisition end date  
Application closing date **03/02/2015**  
Published **No**

**Requisition details**  
This section contains further information that is relevant to this requisition

**Totals**

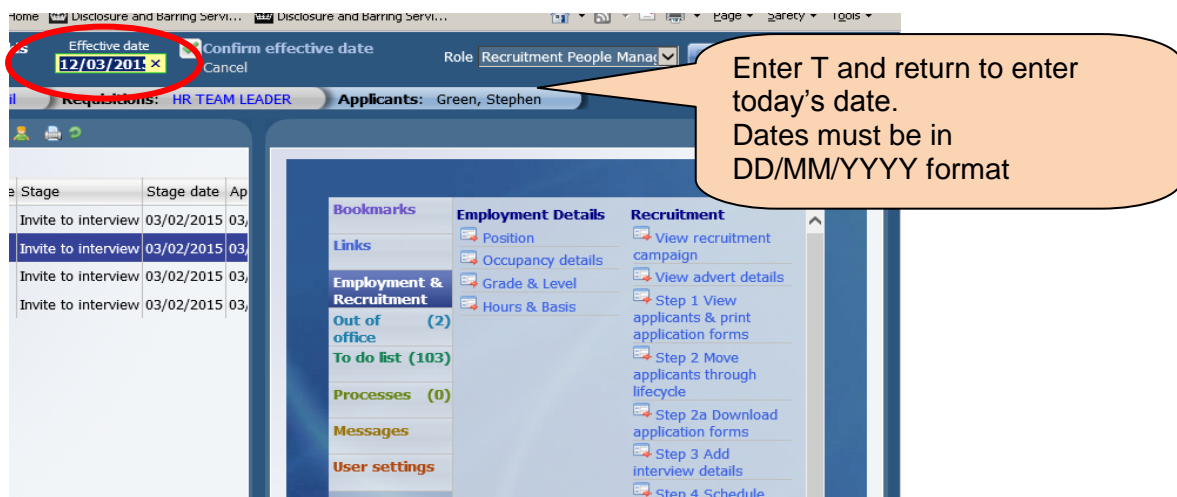
Vacancies	0
Appointments	0
Applicants	4

**Applications**

On some screens the effective date may be highlighted and you will need to press enter over the date that appears (defaults to today's date) before being able to move on.

iTrent is date effective so if you use any date other than the current day the details will show for that particular date.



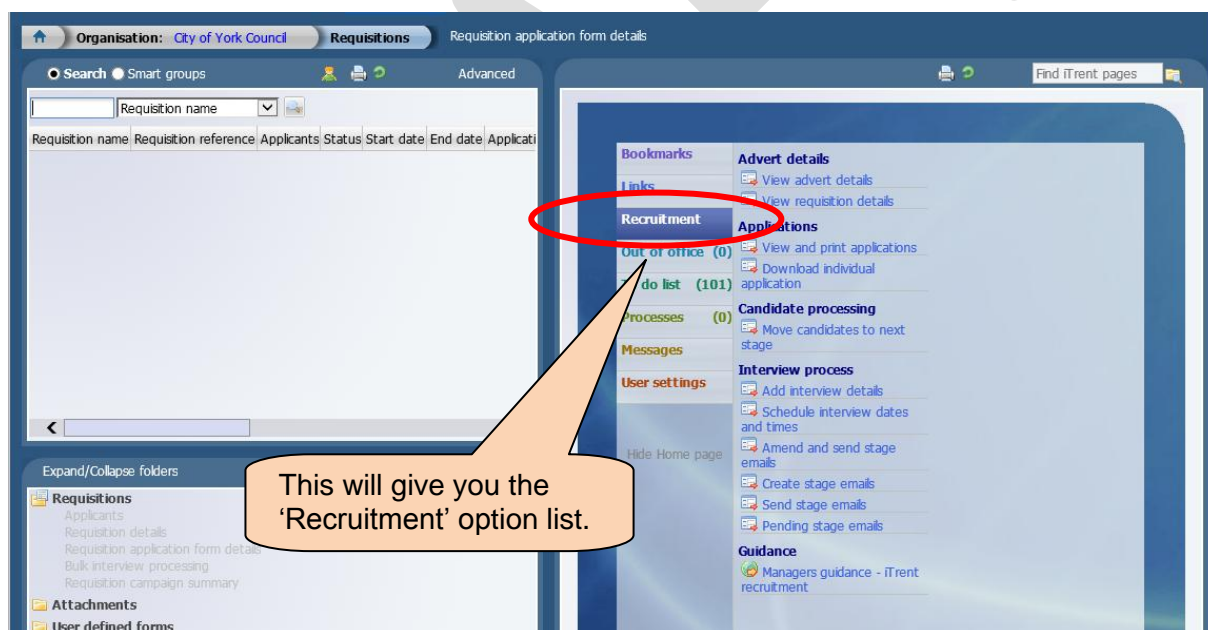


## VIEWING DETAILS OF YOUR ADVERT AND RECRUITMENT CAMPAIGN

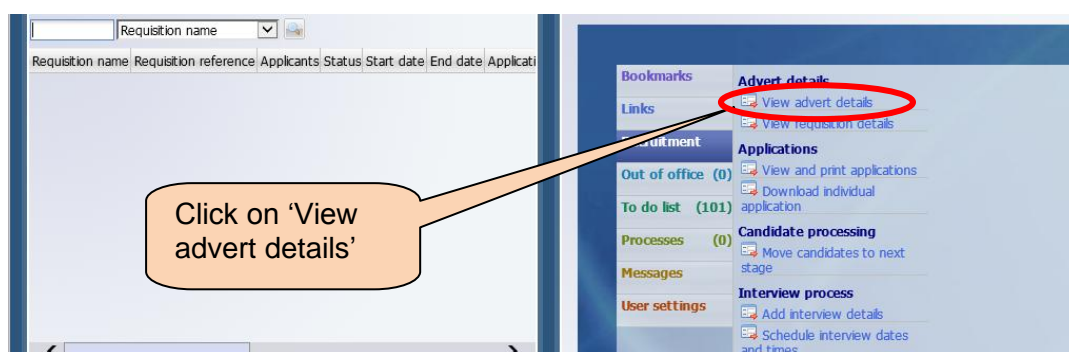
### ADVERT

On the home page click on 'Recruitment' homepage link.

This will give you the recruitment options menu.



Click on 'View advert details'

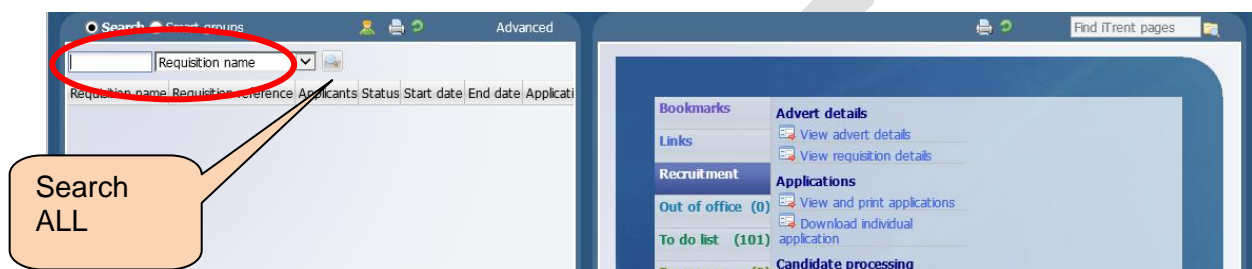




In the search box enter the post title of the vacancy (within iTrent these are called requisitions) you wish to view.

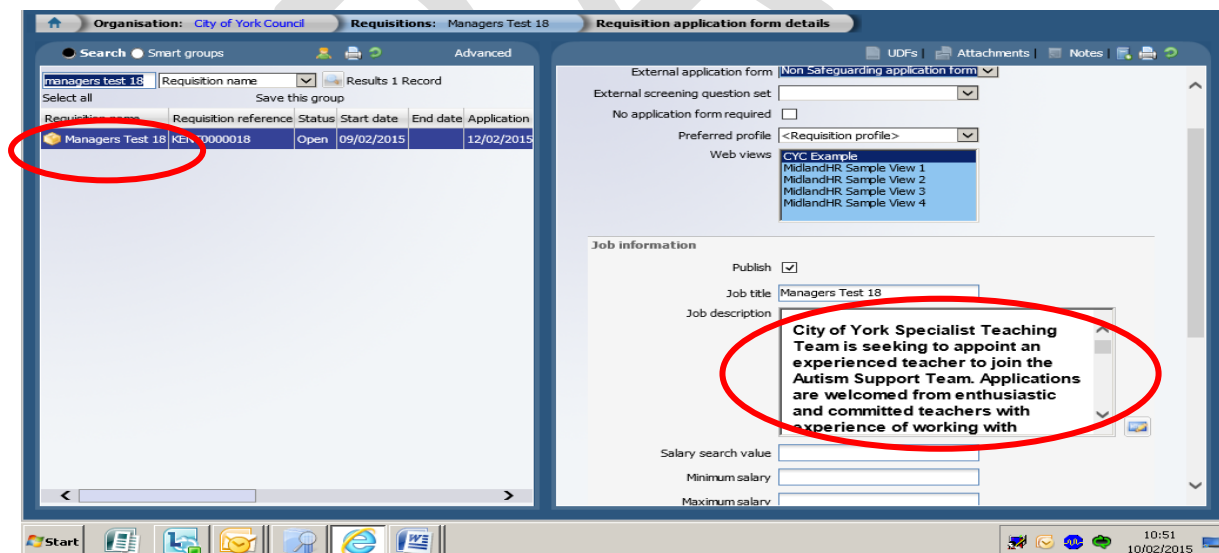
If you do not know the name of the vacancy/requisition click on the magnifying glass search icon to the right of the search field. This will bring up ALL your current open recruitment campaigns.

Once a campaign is finished HR will close the requisition and it will no longer appear when you log into your People Manager – recruitment role.



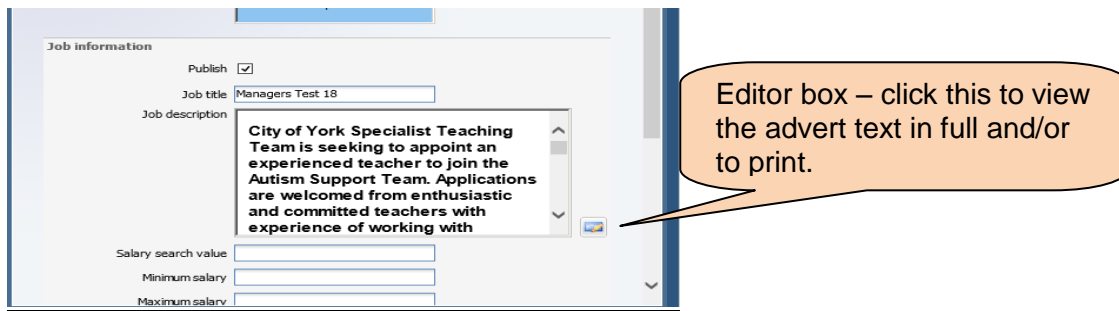
Highlight the requisition in the left panel.

Details of the advert for the role will appear in the right panel.



To view and print the advert click on the editor box which is located to the right of the job description box.

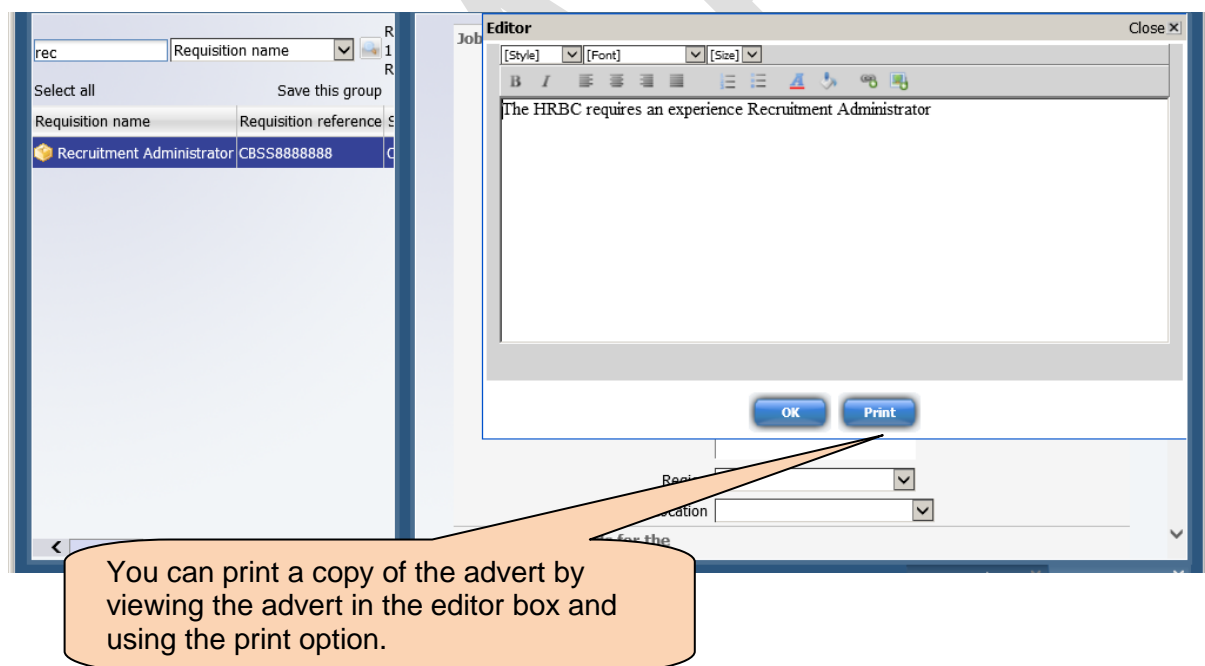




You cannot make any changes to your advert or to the recruitment campaign details on these screens.

Please contact the HR Recruitment team if you require any amendments to be made via [recruitment@york.gov.uk](mailto:recruitment@york.gov.uk)

You can print a copy of the advert by viewing the advert in the editor box and using the print option

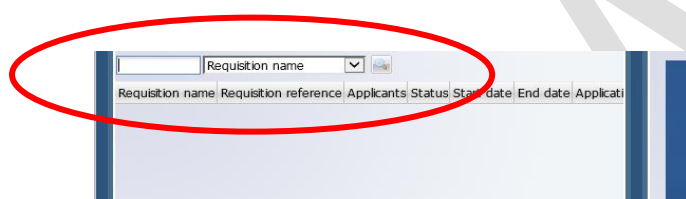
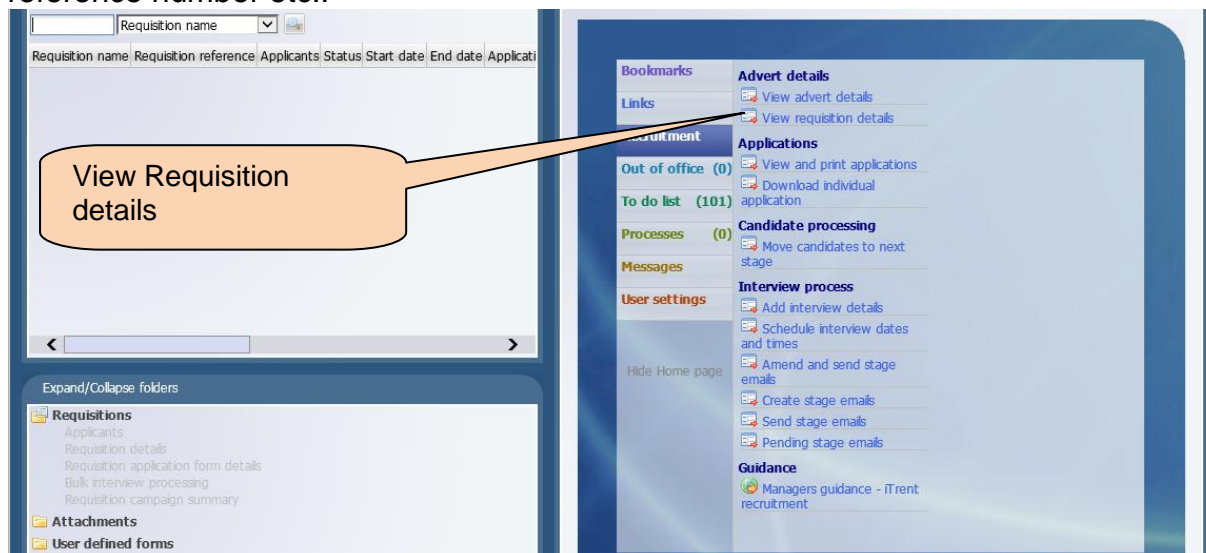




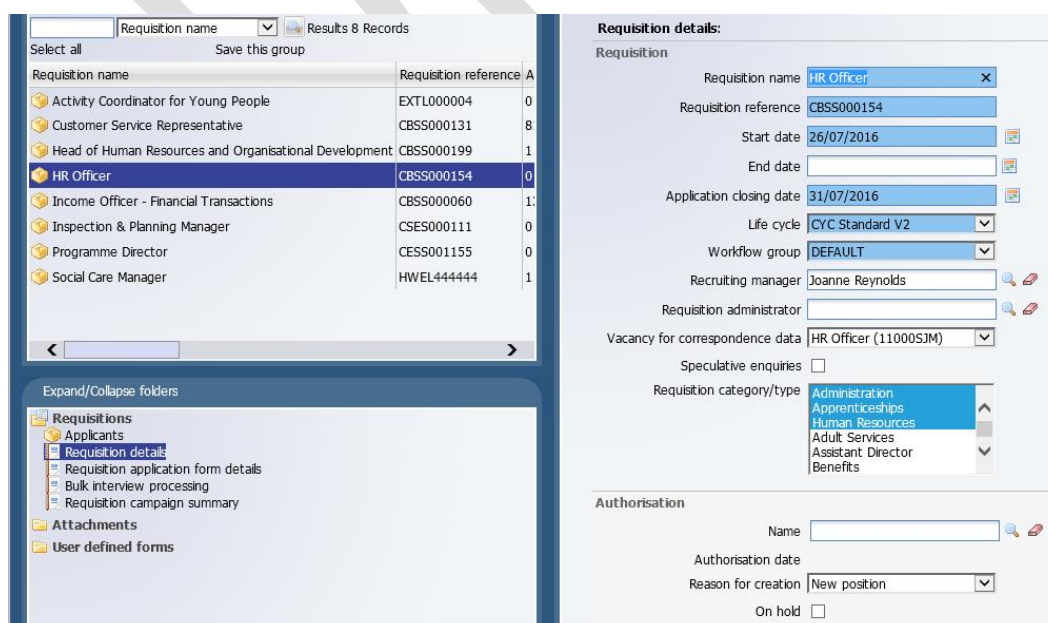
## VIEW VACANCY (REQUISITION) DETAILS

Return to the homepage and recruitment options menu.

To view the basic details of your requisition/recruitment campaign e.g closing date, reference number etc.:



Enter the name of the requisition or search for all your requisitions by using the magnifying glass 'ALL' search. Highlight the requisition in the left panel

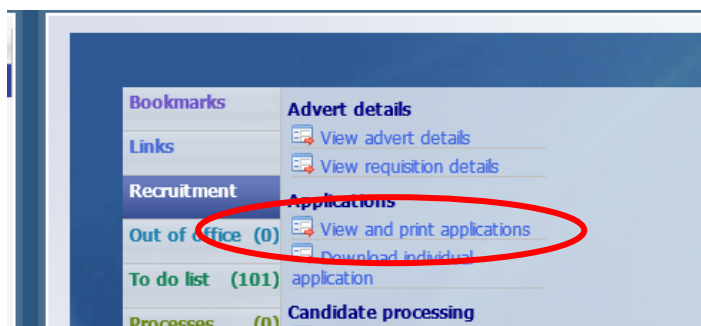




## VIEWING APPLICATIONS

Applications can be viewed as they are submitted by the applicant, however you should shortlist applications as per the guidance within the Recruitment & Selection policy.

Click on 'View and print applications' from the main Recruitment link on the homepage.

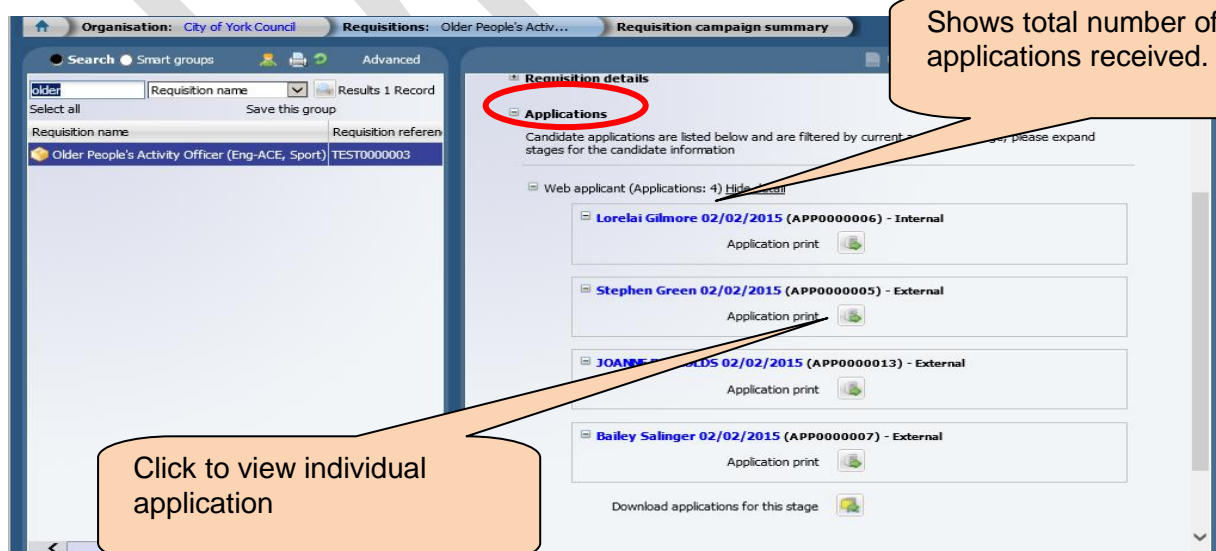


Search for the requisition and highlight this in the left panel.

Details of applicants who have applied for the vacancy will be shown by clicking on the '+' button next to applications.

A list of applicants who have submitted an online application will be listed and will show as 'web applicants'.

Any applications that have been received manually (hard copies) will be sent onto you by the HR.





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

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

If you save applications outside of iTrent you must ensure this is not in a shared area and/or password protect the document(s).

### **Download all applications in bulk**

There is also the facility to bulk download all applications and save these to a folder in a specific CYC area.

Create an empty folder in a secure area (e.g in the V drive, O drive) where others not involved with the recruitment process will not be able to access.

Choose

‘Download applications in bulk’ from the Recruitment link on the homepage.

Search and find the requisition by using the magnifying search icon alongside ‘requisition name’.

The screenshot shows the iTrent Recruitment reports interface. The top navigation bar includes 'Organisation: City of York Council', 'Recruitment reports: Bulk Application Print', and a 'Run report' button. The main content area is divided into two panels. The left panel, titled 'Select all', contains a table with the following data:

Report name	Status	Last run date	Last run time
Bulk Application Print	Complete	12/05/2017	16:07

Below the table is a section titled 'Expand/Collapse folders' with a tree view showing 'Recruitment reports' expanded, containing 'Run report' and 'Download output'. The right panel, titled 'Bulk application print:', contains a search form. The 'Requisition name' field is set to 'Insurance and Risk Officer' and is circled in red. Other fields include 'Requisition status' (All), 'On hold requisitions' (All), 'Recruiting manager', 'Requisition administrator', 'Application closing date', 'Applicants held on file' (All), 'Recruited internally' (All), 'Applicant stage' (All), 'Stage date', 'Last update date', 'Job category/type', 'Application type' (All), 'Surname', 'Forename', 'Output type' (PDF File), and 'Include sensitive fields' (unchecked). A 'Search' button at the bottom of the form is also circled in red.

No not change any other fields. Output type must be set as PDF file - SEARCH

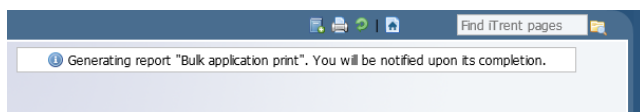
A list of all the applicants for the vacancy will appear – at the bottom of the list there is an option to RUN.

The screenshot shows the bottom of the applicant list interface. It features a 'Search' button and a 'Run' button. To the right of the buttons is a dropdown arrow. The text 'Click RUN' is displayed to the right of the interface.

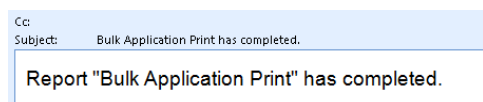


(Note: If you want to exclude any particular applications then tick the exclude box to the right of the relevant candidate. This means their application will not be included in the PDF report when it is run)

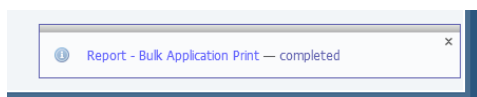
A message will appear to confirm the report is being compiled



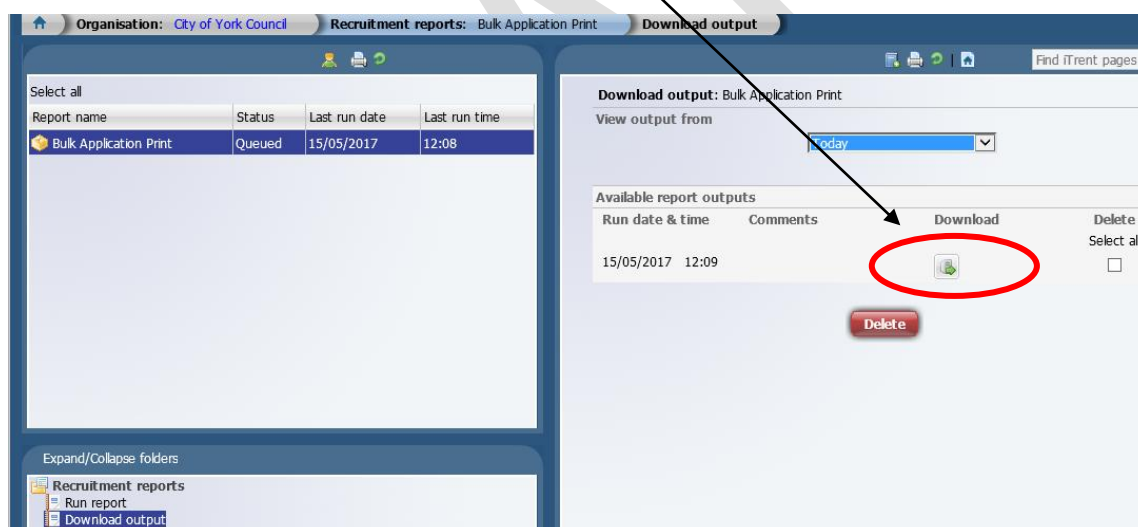
You will receive an email to confirm the report has finished



A message will also appear in the bottom right of iTrent



Once the report has run click on 'download output' on the same page – bottom left panel then click on the green arrow – Download – icon



Open the PDF file – save to desired location

**Ensure that applications are saved in a confidential folder where only those who are part of the recruitment process have access and/or that the PDF document is password protected.**

**You will need to ensure that once the recruitment campaign is finished that any applications stored outside iTrent are deleted. Failure to do this you may be breaking our Data Protection policy regarding the storage and retention of applicants information.**



## **SHORTLISTING**

Shortlisting candidates for interview is done outside the recruitment system.

Shortlisting guidance including forms and templates to record shortlisting decisions are available on the CYC intranet (see Be supported/HR/Recruitment and Selection/ Step 4A – shortlisting candidates).

### **Guaranteed Interview Schemes**

City of York Council operate two Guaranteed Interview Schemes (GIS) for disabled candidates and looked after children and care leavers.

If an applicant has indicated YES on their application form (see examples below) to either of these questions this means they are applying under the scheme and you must invite them to interview if they meet the essential criteria for the role.

#### **Additional Details**

##### **Guaranteed Interview Scheme**

We guarantee, under the 'Positive about Disabled People' scheme, an interview for all applicants with a disability who meet the minimum criteria on the job description.

Are you a disabled person applying on that basis? Yes

##### **Children and Young People in Care**

As part of York's pledge to Children and Young People in Care, City of York Council guarantee an interview for all children and young people in care or care leavers, who meet the minimum criteria on the person specification.

Please help us to meet that commitment by indicating 'yes' if you are or have ever been, in care with City of York Council and are aged 25yrs or under.

Are you a child or young person in care or a care leaver? No

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HR will notify you if there any applicants who have applied under either of these schemes.

If you have any queries regarding the GIS's please contact a member of HR recruitment for further advice



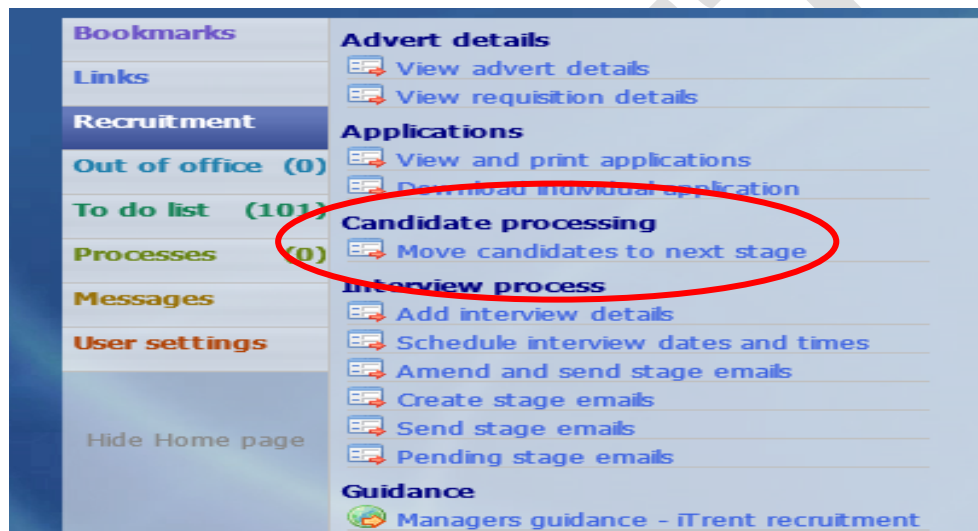
## Inviting candidates for interview

Once the panel have completed the shortlisting exercise the next step is to move applicants who have been invited for interview to the next stage on the recruitment system. This will allow invite to interview emails to be created and sent.

To enable invite letters to be generated from the system applicants need to be moved onto the 'invite for interview stage'.

Chose 'move candidates to next stage' from the links under the recruitment option on the home page.

This page is used at the different stages of the recruitment process to move applicants forward through the system.



Find relevant vacancy (requisition) by using the search facility box.

You can type in the vacancy post title in the search box and click on the magnifying glass to speed this up.



Highlight the relevant requisition in the top left panel.



Enter date (enter 'T' and today's date will auto populate).

A list of all applicants who have applied for the vacancy on line will appear in the top left panel.

All applicants system will be showing at 'Web applicant' stage in the right panel. This is the first stage in the applicant lifecycle.

The screenshot shows a web application interface for recruitment. The top left panel lists applicants with columns for Name, Applicant reference, Stage, and Stage date. The top right panel shows 'Application details' for John Carter, with a 'Stage' dropdown menu highlighted by a red circle. The dropdown menu is open, showing 'Rejected after shortlisting'. A callout bubble points to the dropdown menu.

Name	Applicant reference	Stage	Stage date
Carter, John	APP0001017	Rejected after shortlisting	20/12/2016
Gilmore, Lorelei	APP0001016	Verbally offered	20/12/2016
Salinger, Bailey	APP0001019	Rejected following interview	20/12/2016

This page is used at various points through the process and shows the stage the applicant is at within the recruitment lifecycle

The screenshot shows a table with the following data:

Resource person	Mailing job title	Start date	End date
Marilyn Summers	HR Development & Payroll Services Manager	08/11/2016	

A 'Save' button is located at the bottom of the table.

Any other shortlisting panel members who have access to this recruitment campaign will be shown at the bottom of this screen.

To create invite to interview letters applicants need to be moved to the 'Invite to interview' stage.

Highlight the first shortlisted applicant in the top left panel.

By using the green, amber and red buttons, on the right applicants can be moved to the next stage – hover over the buttons to see the definition of the stage.

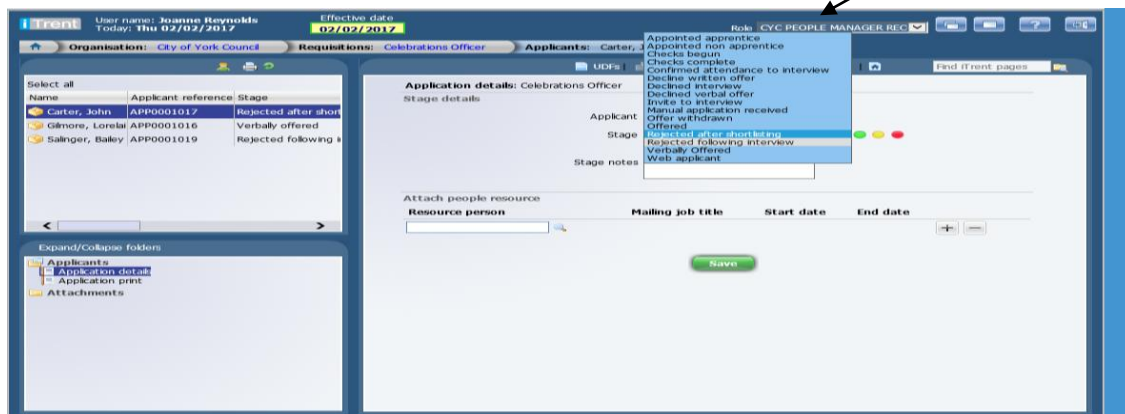
(as a guide green buttons progress applicants forward and red buttons move candidates to a end stage. Amber buttons are quite often undefined)

If the button appears as undefined this means that this stage is not applicable and you will need to use one of the other button options.



Once you have highlighted your shortlisted applicant click on the **GREEN** traffic light (Invite to interview) this will move the applicant to the next stage ready for an invite email to be sent.

Alternatively you can use the drop down list to move to the next stage:

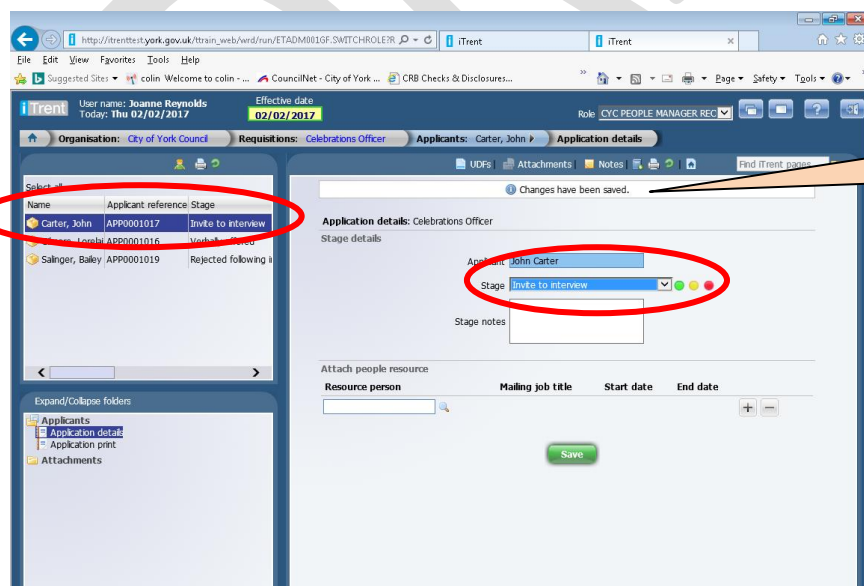


Candidates should move from web applicant to 'invite to interview'

Click on 'invite to interview' on the drop down list and

**SAVE** – if you do not save after clicking the green button or highlighting the option from the drop down list the applicant will remain at the web applicant stage and you will not be able to process the invite to interview email.

The stage for the applicant will now show as 'Invite for interview'



Highlight the next applicant invited for interview on the left side of the screen and complete the same action until all shortlisted applicants are at this stage.



Remember if your applicant is not at the 'invite for interview' stage you will not be able to generate an invite to interview email.

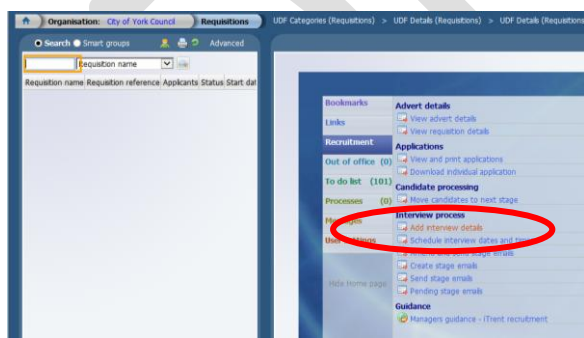
Once completed return to the homepage by using the breadcrumb trail along the top and return to the Recruitment options.

***We recommend that you process applicants who have been invited for interview in the first instance and then return later to create and send emails to candidates who have not been shortlisted. Rejected after shortlisting emails should be generated for all recruitment campaigns. Refer to the process on page XX.***

## **ADD INTERVIEW DETAILS**

In this area you add details about the interview that will be emailed to the applicant. A template letter is in the system but you need to populate this with your particular interview information. You should only do this when shortlisted applicants have been moved to the invite for interview stage.

Choose 'Add interview details' link



Search for the relevant requisition (vacancy) that you want to create the invite emails for.

Highlight the relevant requisition in the top left panel.

The interview template will appear in the right panel.



The fields in this template will populate into an interview letter template already in the system which includes general information about the interview process (see example on page XX).

Any information entered into the template should be grammatically correct, spelling should be checked and the details given must be clear and correct instructions for the candidate.

Fields on iTrent that are blue are mandatory (\*) and cannot be left blank

**\* Length of interview** – enter the time the interview is expected to last eg 30 minutes, 1 hour (this give candidates an idea when planning travel time, time off work etc). Please enter only minutes/hours e.g. 40 minutes, 1 hour and 30 minutes. Do not enter any full stops or commas after the timescales.

The timescale should be for the whole interview process including any other aspects of the interview process e.g meet and greet session etc. This will give the candidate an indication of how much time the process will take so they can consider travel arrangements, time off work etc.

**Interview details** – enter details of any other aspects of the assessment process other than the standard interview. If the interview process just includes a formal interview then leave this section blank

For example if the applicant will be required to give a presentation or undertake a test/assessment/group exercise/show around.....etc. then this should be entered here.

Details should include all that the candidate needs to understand what to expect on the day to be able to prepare for this.

Note: whatever is entered into this field will appear as such in the interview email to the candidate. The recruitment module does not have a spell check facility in this section so you may want to use Word to draft your text and then copy into the template.



If you need any further guidance or advice on what you need to include in your invites then please contact HR.

Include instructions for the candidate if they need to prepare anything before the interview, if they need to bring any equipment for a presentation or details of what ICT facilities/equipment will be provided.

Some examples:

You will be required to give a 10 minute presentation on '*subject*'. A laptop/flipchart will/will not be available.

Following your interview you will be required to undertake a 15 minute IT test including excel and word. No preparation is required for this.

Applicants will be given a tour of the building followed by a 'meet the staff' session which will include refreshments. This will be followed by a formal interview and then a group exercise.

Applicants are asked to prepare a report on '*subject*' to bring to the interview.

Please prepare answers to the following scenarios and be ready to share your reasoning for these to the panel in your interview.

Guidance on the types of assessment tools to consider can be found in the Recruitment & Selection policy on the Intranet.

**Location** – enter full details of where the candidate needs to go to for the interview e.g West Offices, Station Rise, York / Main reception or Hazel Court, James Street, etc.

Include the arrival point in the location if necessary for example if you are interviewing at West Offices the location should be entered as *Main Customer Centre Help Desk, West Offices, Station Rise, York, YO1 6GA*.

You should notify the Customer Centre with the names and times candidate will arrive and provide them with a contact point for the Help Desk to call when your visitor(s) arrive.

**Contact on arrival** – indicate who the candidate should ask for on arrival at the interview location. Use full name and telephone number, if necessary.

**\* Name of interview panel chair** – name of the panel member who will be chairing the interview. Use full forename and surname.

**\* Interview panel chair post title** – full post title of the Interview panel chair. Do not use abbreviations for posts.



Prefix the job title with a hyphen:

Interview panel member  
1 job title - Senior Licensing Officer

This will show in the email in between the name and the post title.

**Interview panel members 1, 2 and 3** - Up to 3 additional panel members (in addition to the chair can be added.

Enter the names and post titles of the other panel members into the template.  
Use full forename and surname and do not use abbreviations.

If there are less than 4 panel members leave the unused panel member boxes blank.

If you have more than 4 panel members the additional panel members details will need to be added manually to the invite email at the 'Amend and send stage correspondence' stage – refer to page XX

\* Contact details to confirm attendance – enter the details of who the applicant should confirm their attendance with. This should not be HR.

Examples:

Catherine Green, Tel: 01904 553000 email [Catherine@york.gov.uk](mailto:Catherine@york.gov.uk)

Jill Smith, PA, Tel: 01904 553000.

Once all details are input into the relevant sections and have been checked for accuracy and spelling - SAVE

If you do not SAVE and leave this page all information entered will be lost.

**There is an opportunity to view the invite for interview email prior to sending to the applicant so that you can check that all details have been included and make any final amendments.**

Return to the homepage by using the breadcrumb trail along the top and return to the Recruitment options.



An example is shown below of how you invite for interview will look when you merge the details and prior to it been sent:

Text in **RED** is auto populated from the details you have entered into the interview template.

All other text is standard CYC information and should not be altered or deleted.

**Requisition Reference:** CBSS8888888

**Applicant Reference:** APP0000006

**Private and Confidential**

Ms Lorelai Gilmore  
12 Hunt Lane  
YORK  
YO24 1PR

Applicants name and address are populated from the candidates application form

Date and times are pulled from the details entered at scheduling dates and times.

Dear Lorelai

**Recruitment Administrator**

Further to your recent application, I would like to invite you to attend an interview on 15 March 2015 at 15:00. Your interview is expected to last **45 minutes**.

Please report to the main customer **Service Desk at West Offices, Station Rise, York** and ask for **David Green, Tel: 01904 55300** on arrival.

The interview panel will consist of:

**Jill Green** - Head of HR  
**Jan Baxter** - Assistant Head of HR  
**Bill Brown** - HR Officer

I would be grateful if you could contact **Lesley Parker on 01904 555555 or email [Lesleyparker@york.gov.uk](mailto:Lesleyparker@york.gov.uk)** to confirm your attendance as soon as possible.

If you have any requirements to ensure that the interview is accessible and fair to you, please could you complete the **Interview Assistance Form** \*\* and return this to us at the address above prior to your interview date.

You will be required to confirm your Eligibility to Work in the UK. Please bring with you to your interview the correct number of original relevant documents to meet these requirements. Further details of acceptable documents can be found **here** \*\*.

Original qualification certificates should also be brought where appropriate.

Thank you for your interest in working for the City of York Council and I wish you luck with your interview.

**View the job description for this role.**\*\*

Yours sincerely  
Human Resources

\*\* These are links to guidance/forms on the CYC website.

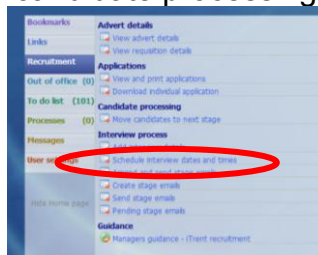


## **SCHEDULING INTERVIEW DATES & TIMES**

Shortlisted candidates should be allocated dates and times to attend interviews. These should have been agreed by the shortlisting panel members.

To ensure the dates and times are included in the invite to interview email, each candidate needs to be allocated a time slot within the recruitment system.

Choose 'Schedule interview dates & times' from the links on the homepage under 'candidate processing'.



Search for the requisition (vacancy)

**As per the CYC Recruitment & Selection Policy, candidates should be given at least one week's notice of an invite to interview to allow them time to plan, prepare and organise travel, childcare and/or work arrangements to attend the interview. This is required even if interview dates have been shown in the job advert.**

**Not providing adequate notice may result in challenges from candidates regarding preparation time or for arranging to attend an interview, and could therefore be seen as putting them at a disadvantage.**

**Any interviews scheduled without the 1 weeks notice from sending the invite will be highlighted and open to scrutiny by the Head of HR.**

**Consideration should be made for candidates attending from outside the York area with the timing of interviews to allow for travelling.**

A screen that lists all the candidates who have been moved to the 'invite to interview stage' will appear.

If any applicants who you would like to invite do not appear on the list then it is likely you have not moved them to the invite stage. Return to 'move applicants through lifecycle' and update the relevant candidate.

Similarly if there are candidates appearing who you have not shortlisted for interview they may have been moved to this stage incorrectly. Please contact HR for further advice.



Populate the relevant fields:

**Stage selection** – choose 'invite to interview' from the drop down list

Contact and Location – Leave blank

**Run document merge** – tick this box (If you do not tick this box then you will not be able to send the invite to interview email)

Against the first candidate enter the **date of interview** in format DD/MM/YYYY in the 'start date' box (you can enter different dates if interviews are held over several days)

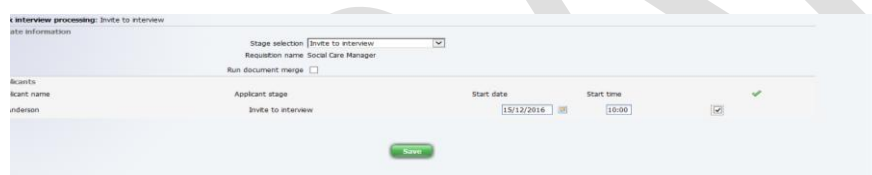
Use tab move through the fields or click with cursor in the relevant field.

Enter the start **time of the interview** in 24hr format – e.g 15:00, 10:30 in the 'start time' box (use a colon (:) in between hour and minutes)

**Tick box** – click on this for each applicant to confirm date and time.

You can click on the Green tick and this will populate all the tick boxes.  
Repeat this for each of the remaining candidates

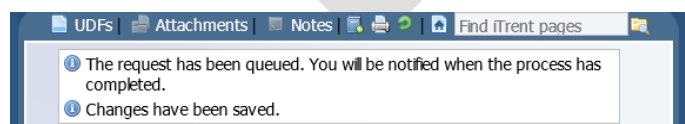
**Tick box** – click on this for each applicant to confirm date and time.  
You can click on the Green tick and this will populate all the tick boxes.



**SAVE**

The system will now merge the interview details you have added with the scheduled dates and times to create the interview email.

A pop up box will appear to indicate this is in progress.



When completed a pop up indicating 'document merge completed' will appear.  
Return to homepage.

**NOTE:** Invite to interview emails have not yet been sent – see Amend and Send Invite Emails.



## **AMEND AND SEND INVITE EMAILS**

The invite emails have now been created and can be checked and sent out to the applicants.

Prior to sending your invite to interview emails ensure you have completed the following steps:

- Applicants who you wish to invite for interview are now showing as being at the 'invite for interview' stage (you can check this by going to the 'Move applicants through the lifecycle' screen from the link on the homepage).
- All relevant Interview details have been entered on the 'add interview details' page.
- Interview dates and times have been entered on the 'schedule interview' page and the tick box has been completed against each applicant.
- The run document merge box has been ticked on the 'schedule interview page'

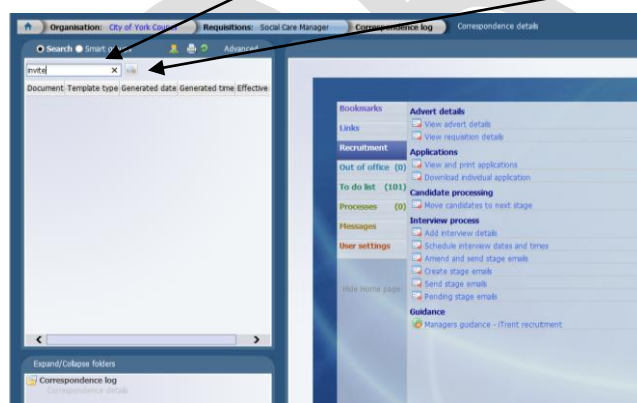
## **Amending and Sending invite to interview emails**

Use the link on the homepage to go to Amend and Send Stage Emails.

Search for the relevant requisition (vacancy).

Highlight relevant requisition (vacancy)

In the field in the top left panel enter type 'invite' and search



A list of candidates will appear in the top left panel.

Candidates that have been shortlisted for interview will now show at this stage (Invite for interview).



Application: [City of York Council](#)    Requisitions: [HR Advisor \(Schools\) P](#)    Applicants: [Correspondence](#)

Applicant reference	Stage	Stage date	Application date	Active/Deactive	Speculative	
<a href="#">Richard</a>	APP0000511	Invite to interview	06/05/2016	01/05/2016	Active	No
<a href="#">B. Erika</a>	APP0000523	Invite to interview	06/05/2016	02/05/2016	Active	No
<a href="#">A. Anna</a>	APP0000527	Invite to interview	06/05/2016	02/05/2016	Active	No

Shortlisted candidate should now show at 'Invite to interview' stage. If any candidates you have shortlisted are not showing as at this stage they should be moved on using the steps on page 15.

To view the invite to interview email for an individual prior to sending, highlight them in the top left panel. '

Check the details of the applicant in the right panel.

The email to the applicant text will be shown in the 'Email body'

Template

Name: Bailey Salinger  
Document: invitation to interview  
Template type: Recruitment  
Generated date: 06/02/2015  
Generated time: 13:13  
Effective date: 06/02/2015

Manual correspondence

Actioned: ☐

New upload filename:  Browse...

Email correspondence

On hold: ☐

Email sent: No

Email address: bailey.salinger@test.co.uk

Subject: Invitation to Interview

Email body

Requisition Reference: IT/CBSS0000000  
Applicant Reference: APP0000007  
Private and Confidential  
Mr Bailey Salinger

To enlarge the text click on the editor box on the bottom left of the 'email body' text box.

Email body

Requisition Reference: CANS000025  
Applicant Reference: APP0000108  
Private and Confidential

Editor box

The email is now enlarged for viewing:

Information from the interview details template have been merged with the standard details to form the invite email.

HTML Editor

Dear Bailey

**HR TEAM LEADER**

Further to your recent application, I would like to invite you to attend an interview on 6 February 2015 at 10:30. Your interview is expected to last .

<<udf\_interview\_format>>.

Please report to and ask for on arrival.

View Source

OK Print



Check the details in the email to ensure that it contains all relevant information the candidate will need and also for any spelling or grammatical errors.

You only need to check one of the candidates invite emails as the text will be the same for all applicants (apart from date/times of interview which you may want consider checking in each individual email)

Any additional information for any one particular applicant can be entered into their email here. Any information added at this stage will only be in the email for this particular applicant.

**If any amendments are required to the interview details or if there is an error or omission in the interview arrangement details then you will need to amend the interview template and re-run the emails prior to sending out.**

You will also need to use a different method to send the emails. See page 19

If no amendments required continue:

Click on OK

Do not tick the 'View source' box, this will change the text to HTML

SEND using the blue button

The invite to interview email will now be sent to the applicant and details of when the email was sent will show under the 'email body' text box.

The screenshot displays the 'Correspondence details' page for an 'invitation to interview'. The left sidebar shows a list of 6 records. The main area shows the email details for the selected record. A red circle highlights the 'Email address', 'Date', and 'Time' fields in the 'Email correspondence' section. A red circle also highlights the 'Send' button at the bottom. A speech bubble points to the 'Email body' section, indicating where the email details will appear.

Document	Template type	Generated date	Generated time	Effective date
invitation to interview	Recruitment	06/02/2015	13:13	06/02/2015
invitation to interview	Recruitment	06/02/2015	13:13	06/02/2015
invitation to interview	Recruitment	06/02/2015	13:13	06/02/2015
invitation to interview	Recruitment	03/02/2015	10:45	03/02/2015
invitation to interview	Recruitment	03/02/2015	10:45	03/02/2015
invitation to interview	Recruitment	03/02/2015	10:39	03/02/2015

Details of when the email has been sent will appear here.

Email correspondence

Email sent: Yes

Email address: bailey.salinger@test.co.uk

Subject: Invitation to Interview

Email body:

Requisition Reference: ITVCBSS0000000

Applicant Reference: APP0000007

Private and Confidential

Email address	Date	Time
bailey.salinger@test.co.uk	06/02/2015	14:55:34

Save Delete Send

Emails are sent to the email address that the candidate has entered as their contact email on the application form.



## **SENDING REMAINDER OF INVITE EMAILS BY BULK**

Invites can be sent individually as in the previous step or once one of the emails has been checked and sent then the remainder can be sent by bulk.

Return to the homepage

Send stage correspondence (from links)

Find the relevant requisition

All pending correspondence will be listed and will show a tick in the 'Deselect all' box.

Name	Template	Email address	Email subject	Generated date	Deselect all
John Carter	invitation to interview	drjohn@test.com	Invitation to Interview	29/04/2015	<input checked="" type="checkbox"/>
Stephen Green	invitation to interview	profgreen@test.co.uk	Invitation to Interview	07/03/2016	<input checked="" type="checkbox"/>

SEND – this will send the emails out to all those candidates listed with a tick 'Deselect all' tick box.

If you do not wish a particular email to be sent remove the tick from the 'Deselect all' box by clicking onto the box.

A pop up message will appear indicating process is being run/completed.

### **Note:**

**Check that all the emails that show in this list are for those candidates for the campaign you are working on as sometimes emails may remain from a previous campaign if this had not been finished properly.**

**Also if you amend the interview details more than once several versions of the emails will appear. Emails appear in chronological order of when they are generated so if a candidate is showing 2 emails the most recent one will be the first to appear in the list.**



## **AMENDING INTERVIEW DETAILS**

On checking the details of the email if any of these need to be amended (e.g dates, times, interview arrangements) after you have checked the merged the initial email then the following process should be followed.

### **To amend interview details:**

Choose 'Add interview details' link

Search for the relevant requisition (vacancy) that you want to amend the interview details for.

Highlight the relevant requisition in the top left panel.

UDF details (Requisitions). The interview details template will appear – make any amendments and SAVE.

.....

### **To amend Interview dates/times:**

Choose 'Schedule interview dates & times'

Change date or time. Tick run document merge again and also tick against each applicant whose details have been changed.

SAVE

.....

Once changes have been made invites will need to be re-merged with the up to date information:

Return to homepage

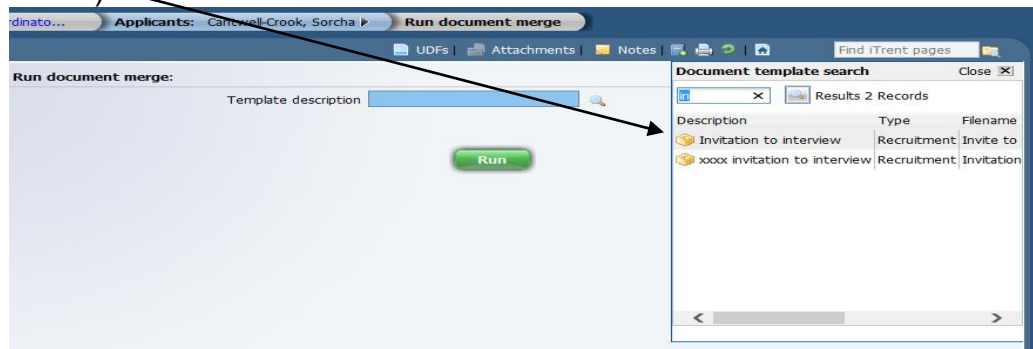
Choose 'Create Stage Correspondence' link

Search for the requisition and when found highlight in top left panel.

A list of the candidates moved to the 'Invite to Interview' stage will appear.



Highlight the first candidate, enter today's date (T and enter) in effective date. Use the Search icon to search for 'Invitation for interview' (the one without the prefix XXXX)



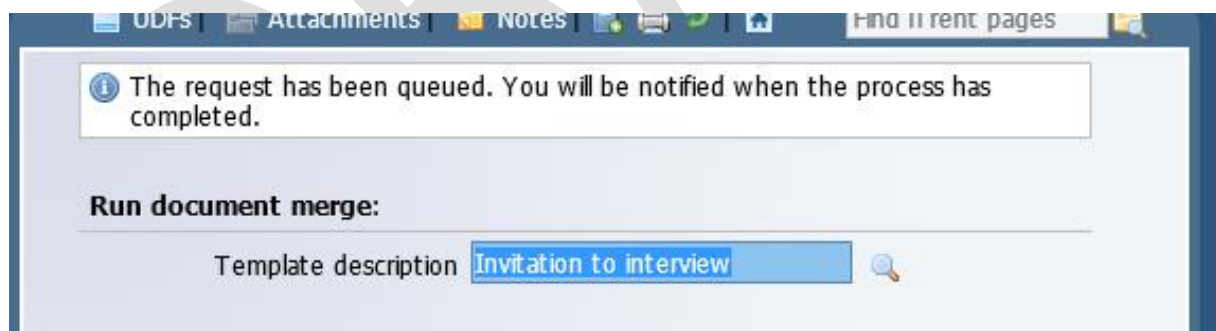
Highlight Invitation to interview line

Run

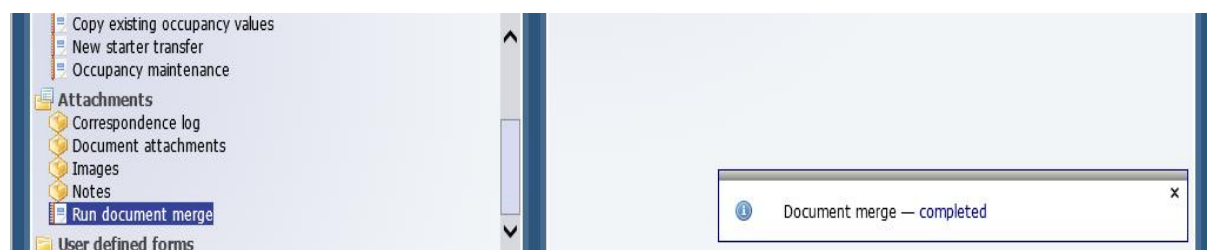


Go to the next candidate in the top left panel and do the same.

A message will appear as the document merge runs for each applicant. You do not have to wait for the completed message to appear before moving onto the next candidate.



As each candidates document is re merged a message to say it has been completed will appear in the bottom right of the screen.





Once all the document merges have been completed for every candidate return to homepage.

Check that the interview email now has the correct details by using the 'Amend and Send' link from the homepage as on page 28.

If the email is now correct and ready to send choose 'Send stage correspondence' from the links.

Search for the requisition

Highlight the requisition

A list of pending emails will appear in the right hand panel.

Be aware that there may be more than one email for the applicant and you will need to deselect any you do not want to send by ensuring the tick in the column on the right is on those that require sending.

	Generated date	Select all
Coordinator	05/09/2016	<input type="checkbox"/>
Coordinator	05/09/2016	<input checked="" type="checkbox"/>
Coordinator	05/09/2016	<input checked="" type="checkbox"/>
Coordinator	05/09/2016	<input type="checkbox"/>

Once the correct correspondence has been ticked use blue SEND button to send out the invite emails.



## SENDING A HARD COPY INVITES

If the applicant has applied via a hard copy application the minimum of details will be input onto the system by HR so that they can be progressed.

A scanned copy of the full application form will be sent to the panel chair for shortlisting.

Applicants who have not supplied an email address will not be able to receive an email invite and you will need to send a hard copy invite by post. Instead of using the 'send' option within the Amend and Send process (pages xx) click on the green download arrow against 'Manual correspondence'

The screenshot shows the 'Correspondence details' page for 'Invitation to interview 2'. The 'Manual correspondence' section is highlighted with a red circle. Below it, there is a 'New upload filename' field and a 'Browse...' button. A green download arrow is visible next to the 'Browse...' button. At the bottom, a dialog box asks 'Do you want to open or save doc1.rtf (546 KB) from itrenttest.york.gov.uk?'. The 'Open' button in this dialog is also circled in red. A black arrow points from the text 'click on the green download arrow' to the green download arrow.

Document	Template type	Generated
Invitation to interview 2	Recruitment	09/03/2015
Invitation to interview 2	Recruitment	09/03/2015

**Correspondence details: Invitation to interview 2**

Template

Name: Lorelai Gilmore  
Document: Invitation to interview 2  
Template type: Recruitment  
Generated date: 09/03/2015  
Generated time: 15:40  
Effective date: 09/03/2015

**Manual correspondence**

☐ Downloaded

New upload filename:  Browse...

Email correspondence

Email sent: Yes  
Email address: sophieparkin@hotmail.co.uk  
Subject: Invite to interview  
Email body:

**Requisition Reference:** CBSS8888888  
**Applicant Reference:** APP0000006

Do you want to open or save doc1.rtf (546 KB) from itrenttest.york.gov.uk?

Open Save Cancel

Using the 'Open' option will open a word letter template, with the interview details merged, which can be printed off and sent out to the applicant. You will need to copy this onto a CYC header before printing.



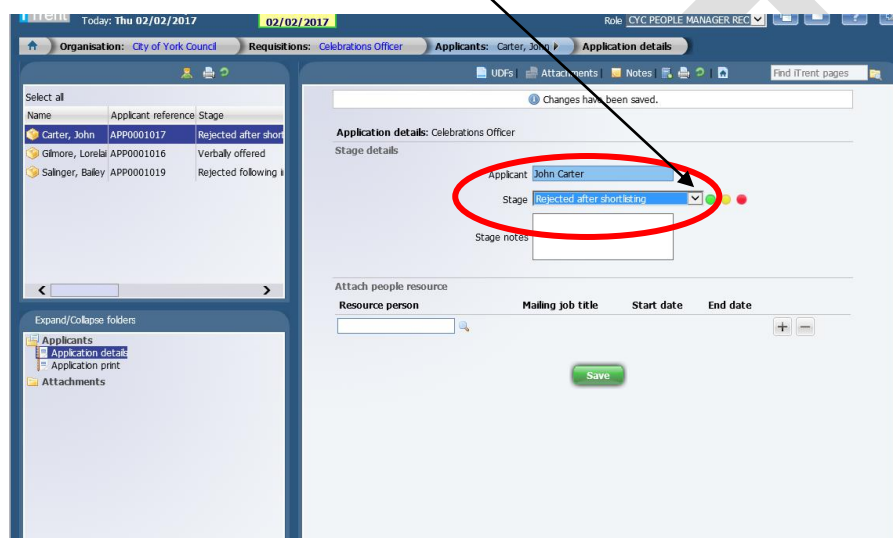
## **Applicants not invited for shortlisting – referred to on page ??**

Emails to those applicants not invited for interview always be sent. This is done once all invites for shortlisted applicants have been created and emailed.

For those applicants who you HAVE NOT shortlisted go back to STEP 2 - MOVING CANDIDATE THROUGH LIFECYCLE (Page xx)

Highlight the first applicant not invited for interview and click the **RED** traffic light to move the applicant to 'Rejected after shortlisting'

Alternatively choose 'rejected after shortlisting' from the drop down menu (use drop down arrow to view options)



SAVE on each applicant.

The stage for the applicant will now show as 'rejected after shortlisting' in the stage field in the top left panel.

Highlight the next applicant invited for interview on the left side of the screen and complete the same action until all the applicants who have not been invited for interview are at the 'rejected after shortlisting stage'

You should ensure that all your applicants are showing at 'invite for interview' or 'rejected after shortlisting' stage.

Return to the homepage

From the recruitment menu choose 'Create stage emails'

Search for the requisition

Highlight the requisition

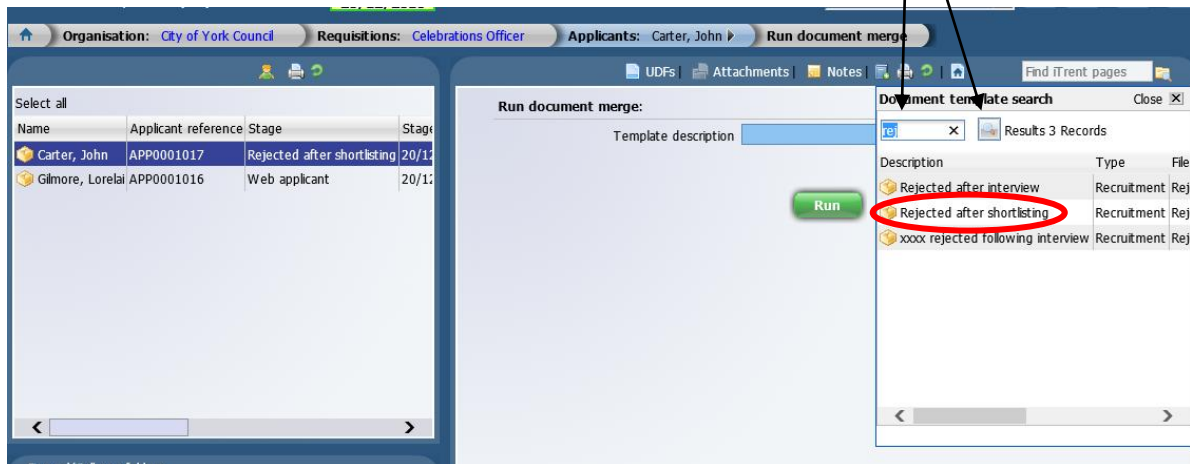
Enter date (T for today)



Highlight the first of the candidates who is showing as 'rejected after shortlisting' in the top left panel.

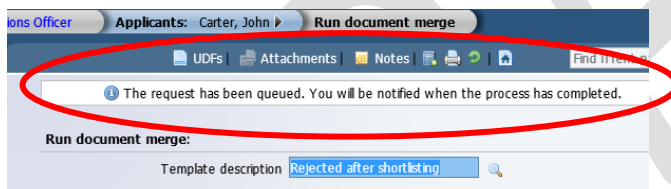
Enter date (T for today)

Search for 'rejected after shortlisting' using the magnifying glass

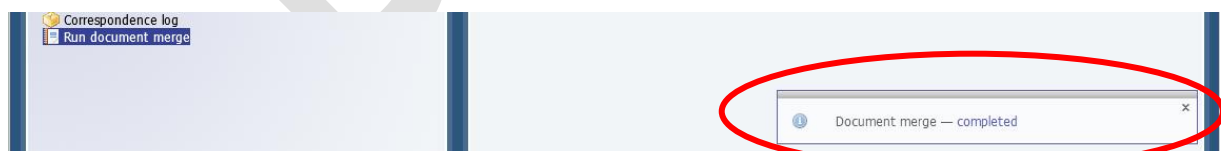


Highlight 'rejected after shortlisting' from list  
RUN

A message confirming the process is queued will appear



A new pop up message will then appear in the bottom right of the screen when the process has been completed.



After this has appeared:

Go back to homepage

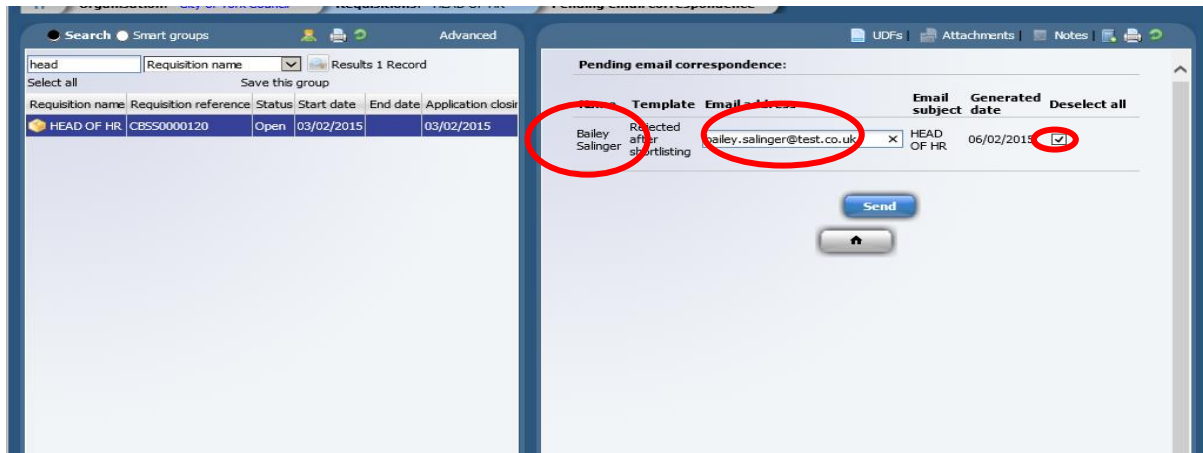
- Pending stage emails

Search for the requisition

Highlight the requisition



The rejected candidates should now show in the pending email correspondence list in the right panel



This is a list of all pending emails for applicants for this requisition.

All the candidates that you have moved and saved to 'rejected after shortlisting' should appear here.

The entries with a tick in the 'Deselect all' box will be sent when the SEND button is clicked.

Check for duplicate entries and untick these if they appear.

Click on SEND to send the standard template emails to applicants that have not been shortlisted.

The email sent will be as follows:

*Dear FORENAME*

*Thank you for your application for the position of <<requisition\_name>>.*

*Unfortunately, this is to advise you that you have not been successful on this occasion.*

*City of York Council would like to thank you for your interest in the post and the time you have taken to complete your application and take this opportunity to wish you every success in the future.*

*Regards*

*Human Resources  
City of York Council*



## Confirmation of attendance at interview

As applicants confirm or decline the interview invite you should move these on through the lifecycle to the next stage.

Go to – ‘Move candidates to next stage’

Highlight the applicant and use the GREEN and RED buttons to move them to either:

- **GREEN** – confirmed attendance
- **RED** – declined interview

Alternatively choose the relevant option (Confirmed attendance or declined interview) from the drop down menu in the stage field.

SAVE

All remaining applicants should be moved to one of these stages.

The screenshot displays the 'Application details' page for 'Gas/Heating Engineer' requisitions. On the left, a table lists applicants: Lorelai Gilmore (APP0000006), Stephen Green (APP0000005), and Joanne Reynolds (APP0000013). The right panel shows the details for Lorelai Gilmore, with the 'Stage' dropdown menu set to 'Confirmed attendance interview'. This dropdown menu is circled in red, showing three colored buttons (green, yellow, red) next to it. The 'Save' button is visible at the bottom.

Name	Applicant reference	Stage	Stage date
Gilmore, Lorelai	APP0000006	Confirmed attendance interview	09/02/2015
Green, Stephen	APP0000005	Declined interview	09/02/2015
REYNOLDS, JOANNE	APP0000013	Confirmed attendance interview	09/02/2015

**Application details: Gas/Heating Engineer**

Stage details

Applicant: Lorelai Gilmore

Stage: Confirmed attendance interview

Stage notes

Save



## **INTERVIEWING**

Interviews are held as per the schedule arranged by the interview panel.

Interview records and scores should be completed by the panel members. These should be scanned and emailed back to HR [recruitment@york.gov.uk](mailto:recruitment@york.gov.uk) as soon as possible following verbal offer being made to the successful candidate.

Guidance on interview protocol and relevant interview record templates can be found on the HR Recruitment & Selection content pages on the intranet.

DRAFT



## **OFFERING THE POST**

Once the interview process has been completed the successful candidate should be contacted verbally and offered the post conditionally .

It should be made clear that this is a verbal conditional offer and will only become unconditional on receipt of all satisfactory pre-employment checks.

### **A start date SHOULD NOT be offered at this point.**

Although HR understand you will be keen to start your new member of staff, a start date should not be agreed at this point. Once HR have confirmed that all pre-employment checks have been completed a start date can be agreed.

HR will issue a formal conditional offer and commence pre-employment checks on receipt of the relevant paperwork submitted to recruitment – see guidance on the intranet for information on required paperwork to complete.

Problems may arise from start dates been agreed prior to all checks being completed which could cause undue anxiety to applicants who then expect these dates to be honoured and may have resigned from their job.

Sometimes there are delays in receiving references, DBS clearances, documents and we advise candidates not to resign from their current roles until they have been advised all pre-employment checks are complete.

## **SUCCESSFUL CANDIDATE(S)**

If the successful candidate verbally accepts the post you can then progress this candidate and the others, that were invited to interview but were unsuccessful, to the next stages.

On the homepage under the recruitment menu – ‘Move candidates to the next stage’

Search for the relevant requisition.

Find your successful candidate and highlight them in the left panel:

Using the green traffic light, select:

**GREEN** – Verbally offered (or choose this option from the drop down list)

SAVE

HR will pick up from the system that you have offered the post and will send you an email with details of what action/paperwork needs completing.



Once the relevant paperwork has been completed and returned to HR, HR will send out a formal written conditional offer letter to the successful candidate and will commence the pre-employment checks.

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

The screenshot shows the iTrent HR system interface. The top navigation bar includes the user name 'Joanne Reynolds', the effective date '02/02/2017', and the role 'C/C PEOPLE MANAGER REC'. The main content area is titled 'Application details: Celebrations Officer'. On the left, there is a table with columns 'Name', 'Applicant reference', and 'Stage'. The table lists three applicants: John Carter (APP0001017, Rejected after short), Lorelai Gilmore (APP0001016, Verbally offered), and Bailey Salinger (APP0001019, Rejected following...). The right side of the screen shows the 'Stage details' for John Carter, with the stage set to 'Verbally Offered' (indicated by a red circle). Below this, there is a 'Stage notes' field and a table for 'Attach people resource' with columns 'Resource person', 'Mailing job title', 'Start date', and 'End date'. A 'Save' button is located at the bottom of the form.

Name	Applicant reference	Stage
Carter, John	APP0001017	Rejected after short
Gilmore, Lorelai	APP0001016	Verbally offered
Salinger, Bailey	APP0001019	Rejected following i

Resource person	Mailing job title	Start date	End date
-----------------	-------------------	------------	----------

**AMBER** – Not in use



## **UNSUCCESSFUL CANDIDATES**

Once the successful candidate has been verbally offered and has accepted the post, a member(s) of the panel should contact all the unsuccessful candidates, by phone, to inform them of the outcome of the interview and to offer feedback.

Following this, unsuccessful candidates should be moved to the 'unsuccessful following interview' stage in the system so emails confirming this can be created and sent .

On the homepage under the recruitment menu – 'Move candidates to the next stage'

Search for the relevant requisition.

Find your first unsuccessful candidate and highlight them in the left panel:

Using the red traffic light, select:

**RED** – Rejected following interview (Note: to be able to move to this stage the candidate should already be on 'confirmed attendance')

Or choose 'rejected following interview' from the drop down list.

## **SAVE**

- If there are no appointable candidates, this option should be used for all candidates. Contact HR for further guidance on how to progress/re-advertise your vacancy.

## **Sending emails to unsuccessful candidates**

To be able to produce an email to the unsuccessful candidate they need to be at the 'rejected following interview' stage.

To produce and send emails:

Choose 'Create stage emails' from recruitment menu on the homepage.

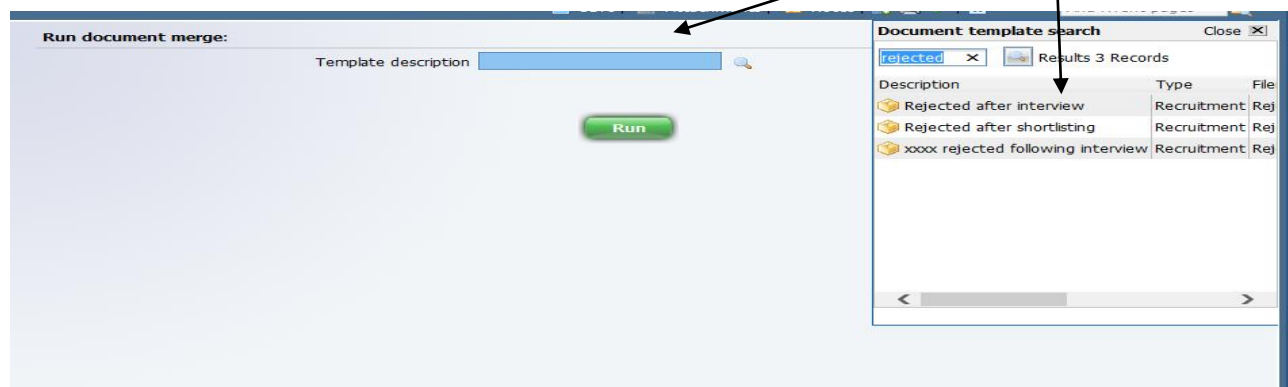
Search for the requisition.

Highlight requisition – a list of all applicants will appear in the top left panel.

Highlight the first candidate that is at stage 'Rejected following interview'



In right panel use the search magnifying glass to search for 'rejected after interview'  
Click on this and it will pull into the Template description blue field.



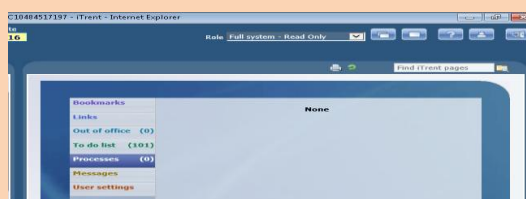
## RUN

The request will be queued.

Whilst waiting for this to run, the other candidates who have been unsuccessful at interview can be progressed as above also.

Notifications will pop up in the bottom right hand corner as the emails are merged. This may take 5-10 mins depending on the number of candidates).

To check if the process has run for the candidate (s) then return to the homepage and click on 'Processes'



You will be able to see if they are queued or complete. If completed move to onto the next step.

To check the email prior to sending choose 'Amend and Send' from recruitment homepage links. This gives the opportunity to view the email prior to sending. Follow steps as per the amending and sending invite to interview emails on page 28. Emails can be sent individually from this screen if this is preferred rather than sending in bulk.



Sending emails to unsuccessful candidates IN BULK

(it would still be prudent to check at least one through the amend and send view):

Return to homepage.

Choose 'Pending stage emails'

Search for requisition.

Highlight requisition.

A list of correspondence merged will appear.

Find the relevant correspondence – 'Outcome of Interview' for the relevant candidates and ensure that only these are ticked.

**SEND**

***(Note: All correspondence with a tick in the 'Deselect all' box will be sent when the SEND button is clicked therefore if you have run other emails for this campaign previously then these will appear also and should be unticked to avoid being re-sent)***

This is the standard email that is sent to all unsuccessful candidates after interview:

Dear (applicant forename)

Thank you for participating in the interview process for the position of (position title).

Unfortunately, this is to advise you that you have not been successful on this occasion.

If you have not received feedback on your interview, and would like this, please let us know by emailing [recruitment@york.gov.uk](mailto:recruitment@york.gov.uk) and I will arrange for a member of the interview panel to contact you.

Thank you for the interest you have shown in working for the City of York Council and I wish you every success in the future.

Regards  
Human Resources  
City of York Council



## **HELP CONTACTS**

If you have any questions, queries or issues when using the system or about the CYC recruitment process please contact:

[recruitment@york.gov.uk](mailto:recruitment@york.gov.uk)

telephone the HR Business Centre (Recruitment team) on (01904) 551619

If your query is regard to your People Manager login please contact:

[mail iTrentSystemAdm@york.gov.uk](mailto:mail iTrentSystemAdm@york.gov.uk)

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