Create and track applicant emails

HRIS SUPPORT CENTRE

Introduction

The document should be followed when sending applicant emails. It also provides navigation guidance to view emails that have been sent to applicants.
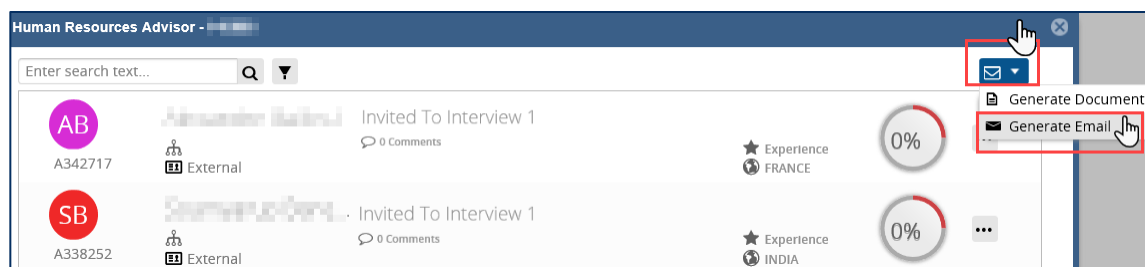
What's changed?
This is new guidance, following the move of the Recruitment functionality from Back Office to Portal in February 2020.
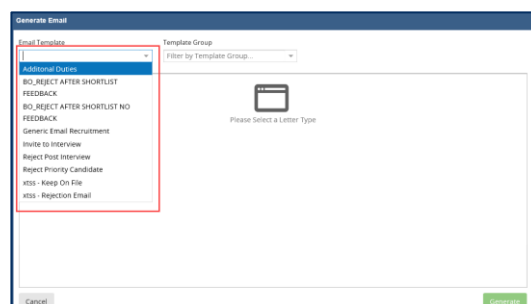
1. Generate emails to applicant

Core Portal > corehr > Recruitment Dashboard > Vacancies

1. Search for your vacancy.

2. From the **Actions** option, select **View Applicants**.

3. From the ✉️▾ menu select **Generate Email**.

4. The *Generate Email* window opens.


5. Select the relevant **Email Template**.

⚠️ **Note:** Any templates with a prefix of 'BO' are templates for letters (not emails), which must be generated in the Back Office (not the Portal).
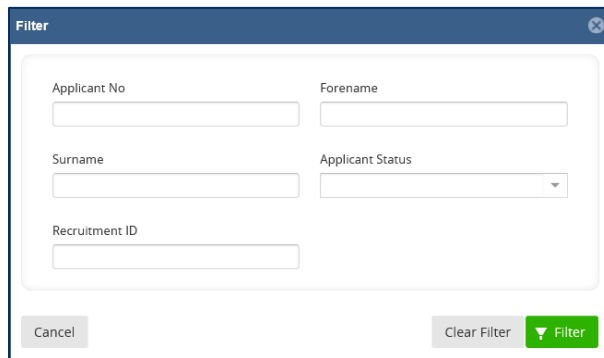
⚠️ **Note**: If you use the email type 'GENERIC EMAIL TEMPLATE' you <u>must</u> add an attachment for all recipients of that email.

6. Select the applicant(s) you wish to send the email to, using one of three ways:

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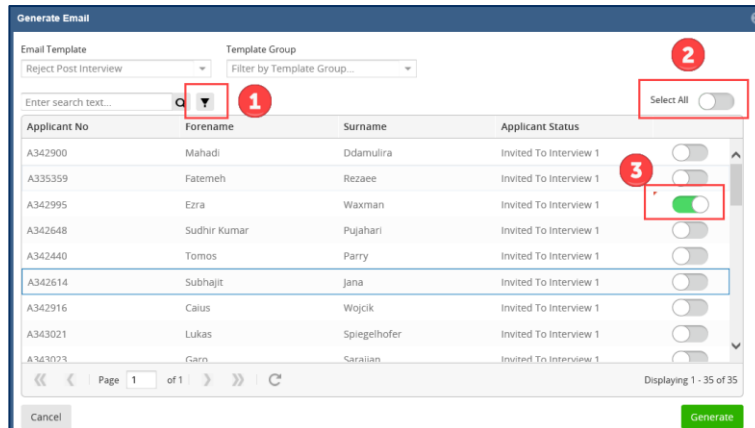
  The filter option is useful if you have multiple applicants and you want to narrow your search, eg by a particular applicant status (see below).
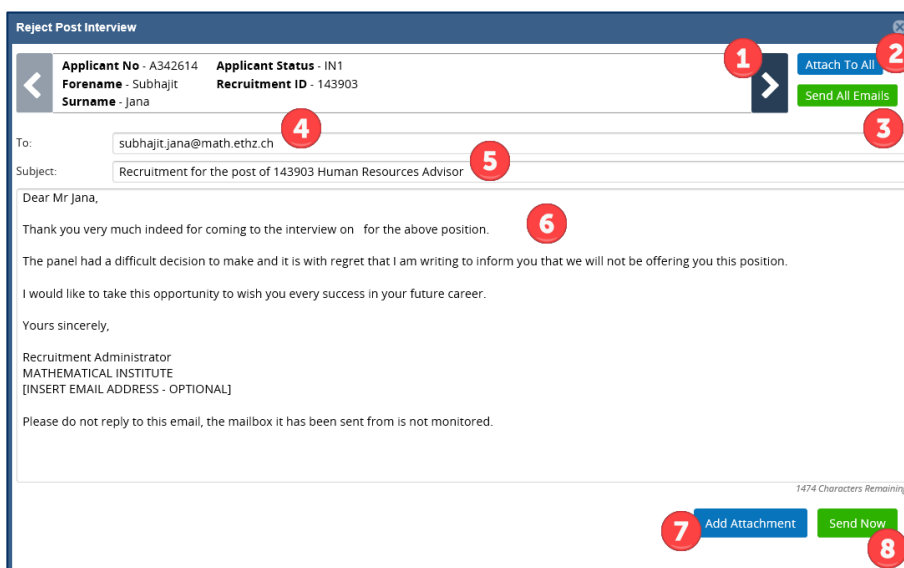

  This option allows you to Select All of your applicants who have applied.

  You can select / deselect applicants individually.

7. Click **Generate**.

8. The *Email window* opens.

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1 Use the forward and back arrows to flick through the different emails (if multiple applicants were selected).

2 If you are attaching a document and want to send it to **all** recipients, use this option.

3 The **final** step is to click Send All Emails.

4 The applicant's email address will auto populate from their application.

5 The subject will auto populate with the vacancy ID and vacancy description.

6 If you update **any** text in the body of the email you will need to make the change on **every** individual email.

Before using the forward and back arrows to navigate through all the emails, ensure you click Save Changes after updating **every individual email**.

7 If you only want to attach a document to **one** of the recipients, use this option.

8 If you have multiple recipients the **Send Now** option will **only** send the email you are currently viewing (the remaining emails will not send).

⚠️ All emails will be sent from a 'no reply' central account: HRIS.MAILRETURN@IT.OX.AC.UK. If applicants accidently reply to the email, they will receive an automatic reply.

All email templates will be updated to include:
'Please do not reply to this email, the mailbox it has been sent from is not monitored.'

The email templates prompt departments to enter their own email address in the body text. You will need to update each email sent in that batch.
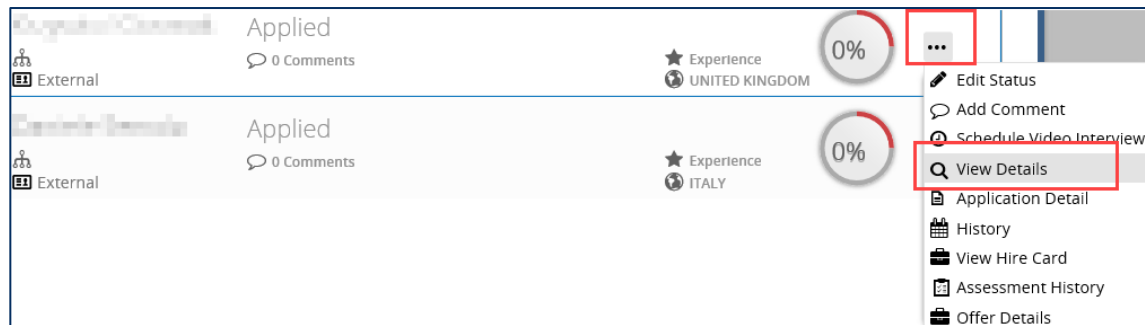
9. Use the 'X' at the top to close the window.

2. Track emails

Core Portal > corehr > Recruitment Dashboard > Vacancies

1. Search for your vacancy.

2. From the **Actions** option, select **View Applicants**.

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3. Select ••• next to the relevant applicant.

4. Click **View Details**.

5. The *Applicant Details* window opens.

6. Select the **Emails Sent** menu.

7. If they have applied for multiple vacancies*, use the vacancy filter to change it from **All** to your vacancy.

8. To view an email click on the 🔍 icon.

> ⚠️ *** Please note**, if an applicant has applied for multiple vacancies, you will be able to see the emails sent for **all** of their vacancies, irrespective of which department sent them. Historical emails sent in the Back Office will **not** show in the Portal.
> We appreciate this doesn't follow our usual departmental security model in the system, however this does **comply with GDPR regulations**.