How-To Guide

Generate shortlisting packs and screen applicants

University **HUMAN RESOURCES** | UNIVERSITY OF OXFORD

This guide covers how to view your applicants, generate applicant packs for shortlisting, screen for priority candidates, and screen the Private Questions report. There are links throughout this guide linking you to sections within it or to external links to helpful web pages.

This guide covers the following process steps:
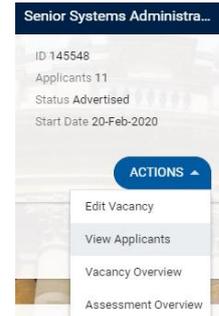
1. View applicants

Core Portal > Recruitment > Vacancies > Search for your vacancy

Note* When an applicant applies online, they will automatically appear in your vacancy. View the current number of applicants in the vacancy tile from the **Vacancies** screen.

It is not possible for an applicant to unsubmit their application, contact HRIS Support for advice.

1. To view the list of applicants, click on the blue **ACTIONS** button in the vacancy tile of your vacancy.
    2. Select **View Applicants**.
    3. The **Applicant Details** screen will open.

The **Applicant Details** screen shows a list of recent applicants and options to view details about them, via the ellipsis button (three dots).

Each applicant is assigned a unique applicant ID (displayed after their name), and their applicant status will be set to 'Applied'.

To exit, click **Recruitment** under the title **Applicant Details.**

2. Generate application packs for shortlisting

Each application consists of several parts. The web forms completed by the applicant online, (eg Referee Details and the Questionnaire), and attachments (eg Supporting Statements and CVs).

Whilst the online parts of the application form one document, each applicant can submit up to five additional attachments. These are held as a separate document.

Note* Application forms with an inbuilt supporting statement do not permit applicants to attach documents. On these occasions, the applicant may email you any attachments separately.

The 'Generate Applications' process combines these separate documents into a single PDF file, per applicant. Where possible, add separate attachments to the applicant's application, before generating the single PDF.

Add attachments to applications

Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants

⚠️ **Note*** All documents manually attached to an application will be visible to the applicant through the applicant portal. Therefore, **do not upload confidential documents** that you do not wish to share with applicants, such as references.

1. Search for the applicant using their name or applicant number.
2. Click the ellipsis (three dots) at the end of the applicant's row.
3. Select **Applicant Details**.
4. Click **Documents** in the left-side menu.
5. Click the blue **UPLOAD DOCUMENT** button.
6. Fill out the form:

Field Name *Mandatory	Description
Document Type*	Select **Applicant Document** from the drop-down menu.
Vacancy*	Select the vacancy from the drop-down list.
Description	Add a name for the document - this will appear in the document list. It is best to include the applicant's name in the description, followed by what the document is.
Comments	Add any necessary comments.
Include in application form	Slide the blue toggle across to the right, to show that this should be included in the application form.
File to Upload*	Select the arrow icon to open your files. Search and select the document to attach.

7. Click **OK**.
8. A green success message will appear. Wait for the dark green line to fill.

Document uploaded successfully
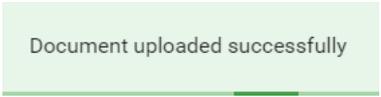
9. You'll be taken back to the **Documents** screen. The document will appear in the table. Click the ellipsis to either **View** or **Delete** the document.

10. To exit, either use the white back arrow or select a screen name in the breadcrumbs.
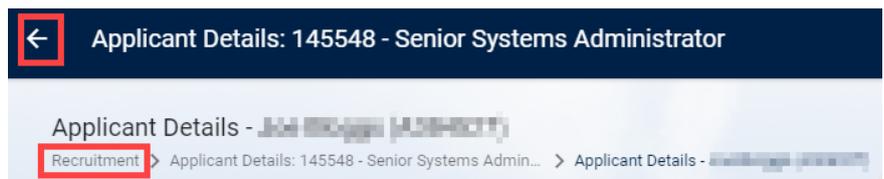
← Applicant Details: 145548 - Senior Systems Administrator

Applicant Details -

Recruitment ❯ Applicant Details: 145548 - Senior Systems Admin... ❯ Applicant Details -

Important points to note

- Documents must not be password protected or saved with 'track changes' or read-only. Otherwise, you may experience issues when uploading the document.
- The system accepts the following file types **only**: .pdf (recommended), .doc, .docx, .txt, .xlsx and .rtf.

- Attach all files as PDF documents, where possible. This ensures that the appearance and format of the attachments are maintained.
- A maximum of five files each up to 4MB in size, may be attached, in total.
- The file name of each attachment must not exceed 25 characters.
- For further guidance, see: Applicant [online support guidance](#).

> ⚠️ **Note*** You are unable to manage attachments for applications. This includes:
> - Select to ignore a troublesome attachment an applicant has uploaded (eg password protected CV)
> - Delete an attachment from a submited application
>
> If you need to do any of the above for a specific reason, contact HRIS Support.

Generate applications

Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants

1. From the **View Applicants** screen, click on the blue **ACTIONS** button, top right corner.
2. Select **Generate Applications**.
3. The **Generate Applications** screen opens:

4. Indicate which applicants' applications you wish to generate into an online PDF.
5. There are several options to choose from to select applicants:
   5.1. Either click on the **Select All** button, as highlighted in the image above, to select all applicants (suitable only if the total number of applicants is below 50), or
   5.2. Click once anywhere in an applicant row to select that applicant, you could select one only or several specific applicants as shown in the image here:

> ⚠️ **Note*** A maximum of 50 applicants can be selected at a time and their packs generated.

> ℹ️ **Note*** A filter using applicant status can be used if needed by clicking on the drop-down
>
> Total applicants for selected status 11
>
> All ▲
>
> All
>
> Applied

6. Click the blue **ACTIONS** button top right.
7. Select **Generate Applications**.
8. The system will process your request (a blue wheel will show) and then a green success message will appear.

> The job has been submitted. You will receive an email when complete

9. Wait for the dark green line to fill before exiting the screen.
10. To exit either use the white back arrow or select a screen name in the breadcrumbs.

> ← **Applicant Details: 145548 - Senior Systems Administrator**
>
> Generate Applications
> Recruitment > Applicant Details: 145548 - Senior Systems Admin... > Generate Applications

11. You will receive an email once the packs have generated.

View generated applications

> Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants > Actions > Generate Applications

1. If an application has successfully generated into a combined PDF, you will see a **Yes** in the **Created Document** as outlined above.
2. To view the PDF, click the ellipsis (three dots) at the end of an applicant row with a created document.
3. Select **View Creation Document**.
4. The online PDF document will display in a new browser page.

Once your applications have been generated, merge them into one single PDF document that you will share with the shortlisting panel, as part of their shortlisting pack.

> ⚠️ **Note*** Review the **Error** column for all your applications. If there is an issue with one of the individual packs, information may be omitted. Eg an applicant has password-protected one of their documents. The PDF will still generate, but the **failed document will be omitted**. Occasionally, applicants also attach zip files. Such issues can only be identified by reviewing this **Error** column. Contact HRIS Support for advice on each circumstance.

Merge Applications

> Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants > Actions > Generate Applications

1. Check the Created Document column to see which applicants have an individual PDF pack generated. There will be a **Yes** in the **Created Document** column.
2. Indicate which applicants' PDF packs you wish to merge into one.
3. There are several options to choose from to select applicants:
a. Either click on the **Select All** button, at the bottom left of the applicant list, to select all applicants (suitable only if the total number of applicants is below 50 see [section](#) below these process steps), or
b. Click once anywhere in an applicant row to select specific applicants as shown in the image here:

4. Review the **Error** column for any indicated errors. If there is an issue, contact HRIS Support who will advise on each circumstance.
5. If there are no errors, click the blue **ACTIONS** button top right corner.
6. Select **Merge Applications**.
7. The system will process your request (a blue wheel will show) and then a green success message will appear.
8. Wait for the dark green line to fill before exiting the screen.

The job has been submitted. You will receive an email when complete

9. To exit either use the white back arrow or select a screen name in the breadcrumbs.

10. You will receive an email once the packs have merged.

> ℹ️ **Note*** You will need to create a new merged PDF before closing any vacancies that require a Tier 2 visa, the Home Office 'Resident Labour Market Test' (RLMT) requires you to keep a copy of all applications shortlisted for final interview, in the medium in which they were received. See the **Close a Vacancy** guide for further detail. For vacancies

## Merged packs for applicant list exceeding 50 applicants

If the total number of applicants exceeds 50 then only 50 applicants must be selected at a time and their packs merged.

1. You will need to create the pack for 50 applicants.
2. Download it (see how here) and save it securely, locally.
3. Delete the pack from CoreHR as instructed here.
4. Create the next pack for the next 50 applicants. Follow these steps.
5. Repeat steps 2 to 3 above, for as many packs of 50 applicants, as is needed.
6. Open the locally saved packs, one at a time, and screen the packs for Priority Candidates as per these instructions from step 2.

View merged applications

Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants > Actions > Generate Applications

1. Click **VIEW MERGED APPLICATIONS** button bottom right of the screen.
2. The complete pack of online PDF applications (the ones that were selected to be merged) will open in a new browser window.
3. Using the relevant options presented (could be browser dependant), download the pack and save the PDF pack to a secure location.
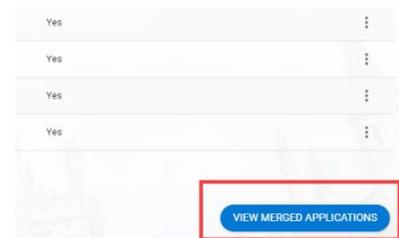
> **Note*** Follow Information Security guidelines and your department's own processes for saving the PDF pack securely.

The merged pack will have an Introduction page detailing information about the vacancy and listing the number of applicants selected to feature in the pack. Each applicant's information is separated by a header page.

Merged pack added to Vacancy

The merged pack will also automatically save to the Vacancy and can be downloaded and deleted.

Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > Edit Vacancy > Vacancy Profile > Documents

1. Click on the ellipsis (three dots) at the end of the row for the Merged Applications document.
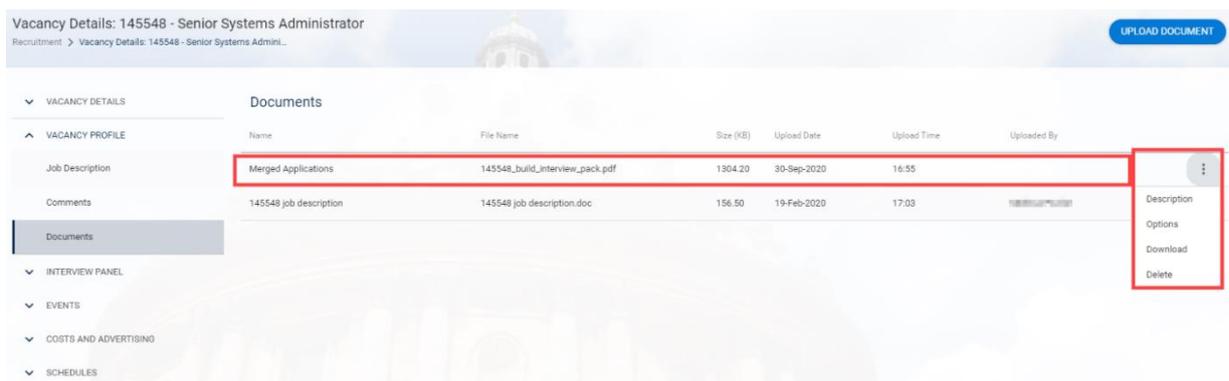
2. Select either:

    2.1. **Download to open the merged application pack in a new browser window.**

    2.2. **Delete** to remove the Merged Application pack. Once deleted here it will also be deleted from the **Generate Applications** screen.

> ⚠️ **Note*** **Description**, **Options** and the blue **UPLOAD DOCUMENT** button are not used by the University for Merged Applications.
>
> **Options** and the **UPLOAD DOCUMENT** button are used for publishing documents related to the advert (eg Job description) to either the internal jobs board or the University's Jobs web pages.

Delete generated or merged applications

Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants > Actions > Generate Applications

Generated application

1. Click once on the row of the applicants' whose generated application(s) you wish to delete. Alternatively, click on the **Select All** button below the list of applicants to delete all the generated applications.
2. Click on the **ACTIONS** button top right.
3. Select **Delete Selected**.
4. A success message appears, wait for the dark green line to complete.

> The applications have been deleted

5. The **YES** in the **Created Document** column and ellipsis option should now be removed from the individuals' row. You may need to refresh your browser and navigate back to **Generate Applications** screen to see the removal of the generated applications.

Merged applications

1. Click on the **ACTIONS** button top right.
2. Select **Delete Merged Application**.
3. A success message appears, wait for the dark green line to complete.

> The Merged Application has been deleted

4. The VIEW MERGED APPLICATIONS button bottom right will have disappeared. The document will also have been removed from the vacancy (Vacancy Profile > Documents).

Add a late application to a merged pack

1. To add an additional late application (or changed application) to the merged pack, follow the instructions above to delete the merged applications.
2. Follow the steps in Generate Applications section of this guide to generate a combined PDF application, only for the late individual(s) (or for the applicant whose application has changed).
3. Follow the steps in the Merged Applications section of this guide to create a new merged application pack, for all applicants, including the late application.

3. Screen the merged pack for Priority Candidates

After the vacancy closing date, review each application to identify any priority candidates. Check that a letter of redeployment has been attached or emailed to you if you have used the application form with an inbuilt statement. If preferred by the selection panel, priority applications can be considered before the vacancy closing date. Please refer to the [University's policy on Priority Candidates](#).

A priority candidate is an existing employee:
- with more than two years' continuous service, who is within the last three months of a fixed-term contract of employment; or
- who is at risk of redundancy from a permanent post; or
- who needs to be redeployed on health grounds.

> Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > View Applicants > Actions > Generate Applications

Add emailed Priority Candidate letters to generated applications

1. Priority applications will be included in the merged application pack apart from those emailed to you.
2. Securely save the attached Priority Candidate letter locally.
3. Follow the steps in [Add attachments to applications](#) in this guide to add the emailed document to the applicant's application.
4. If you have already created the merged application, follow the steps in [Add a late application to a merged pack](#) to ensure the inclusion of the Priority Candidate letter.

Screen and record Priority Candidates

1. Click on the blue **VIEW MERGED APPLICATIONS** button, found bottom right of the screen.
2. The merged applications pack will open in a new browser window.
3. Scroll through these applications to see if any have a priority candidate letter attached. Alternatively, you can use a CTRL+ F search functionality in your browser window and search by the term "priority candidate".
4.
5. Where the redeployment letter has been provided, you should add 'Priority Candidate' into the Comments field against the relevant applicant(s). Click the white arrow to return one screen.

← Applicant Details: 143062 - Rouse Ball Professorship of Mathematics

6. This will take you to the Applicant Details screen.
7. Search for the Priority Candidate using their name.
8. Click on the ellipsis (three dots) at the end of their row of information.
9. Select Comments. This will open the Comments screen.
10. Click the blue ADD COMMENT button.
11. Type in 'Priority Candidate'.
12. Select OK.
13. The green success message will appear, wait for the dark green line to fill.
14. Repeat for all Priority candidates.
15. Priority Candidates need to be brought to the attention of the shortlisting panel. Follow your department's process on how you notify the panel.

Comment saved

> **Note*** If the merged Application Pack is large then the panel could be advised to use CTRL+ F (search with 'priority') to locate priority candidate letters/ mentions in supporting statements if required.

4. Download the Shortlisting Form

The merged application along with a shortlisting form make up the shortlisting pack. The shortlisting form is used to record whether each applicant has met the essential and desirable criteria, listed in the Job Description document, attached to the vacancy. The results on this form help to determine who will be interviewed. There are two types of shortlisting form:

- A Shortlist Form Standard will allow you to score 7 essential and 7 desirable criteria
- B Shortlist Form Extended will allow you to score 14 essential and 14 desirable criteria

Follow the **Generate and download letters and forms in CoreHR** guide to see how to generate and download the appropriate shortlisting form from CoreHR. This CoreHR form will have certain applicant and vacancy details populated, saving you time.

> **Note*** If you have any priority candidates it is important to indicate these against their entry on the form.

5. Send the Shortlisting pack to the Selection Panel

Once you have the PDF pack and shortlisting form, send these to the Selection Panel. Avoid printing these packs.

> **Note*** Follow Information Security guidelines and your department's own processes for sharing the shortlisting pack securely.

6. Screen the Private Questions Report

Whilst your panel are shortlisting you must screen your applicants further, using the Private Questions report from HR Reporting. This report must be run for each recruitment exercise, after shortlisting and before the interviews take place. This helps to avoid bias within the shortlisting process.

1. Follow the **Run reports in HR Reporting** guide to generate the report.
2. Review the answers to questions about:
   - An applicant's interview availability (if included in the application questions).
   - Their previous employment, for example, ongoing disciplinary matters or reason for leaving.
   - University connections, for example, are they related, or do they know a panel member, or anyone linked to the vacancy.
   - Right to return. Check whether they previously worked at the University and they have the right to return. There are certain circumstances which may place restrictions on an ex-employee returning.
   - Criminal convictions or unspent convictions.

> **Note*** These questions do not appear in the merged PDF application file, that is shared with the interview panel.

The report will only return results where an applicant's answer will require you to act. If your report returns any results, seek advice from your HR Business Partner and liaise with the panel accordingly. These conversations should take place before the interviews.

Depending on the advice of the HR Business Partner you may need to record the applicant as invalid. There is an 'Invalid' applicant status which you can select. For instructions on how to update applicant statuses follow the **Manage Recruitment statuses and events** guide.

> **Useful Reports:** RECDEP47_Private Questions

7. Next Steps

1. Update the vacancy status to Shortlisting. Follow the **Manage Recruitment statuses and events** guide.
2. Once shortlisting has been completed and the panel has reported back with their decisions, change the status of the relevant applicants to Shortlisted or Rejected after Shortlisting. Follow the **Manage Recruitment statuses and events** guide.
3. Update the relevant vacancy events eg Right to Return. Follow the **Manage Recruitment statuses and events** guide.
4. Create the interview schedule and assign time slots, once the shortlisting panel has confirmed who has been shortlisted and who has been rejected. Follow **Record interview panel members and create interview schedules** guide.
5. Send invites to interviews – follow **Generate and download letters and forms in CoreHR** guide.
6. Send rejection communications– follow **Create and track applicant emails** guide.