How-To Guide

Manage applicant details

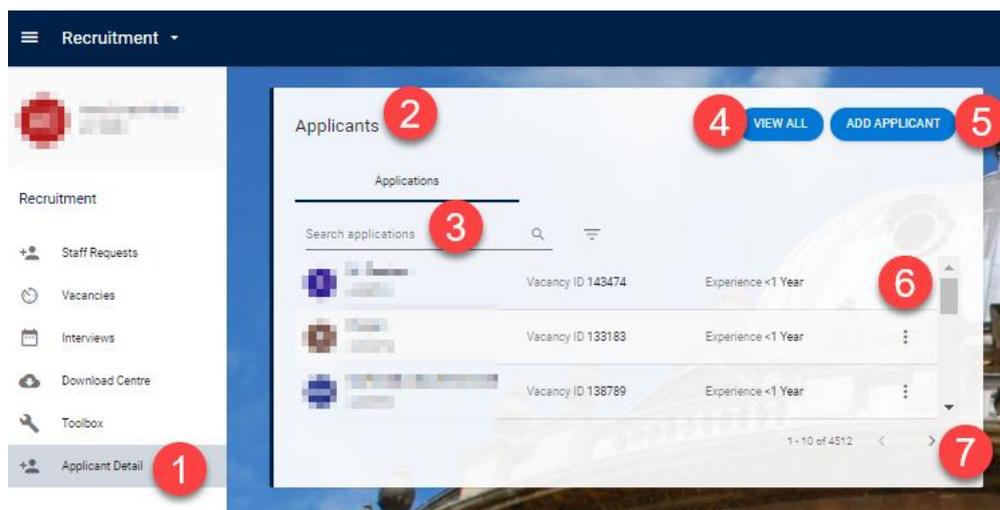University HUMAN RESOURCES · UNIVERSITY OF OXFORD

This guide will provide an overview of the **Applicant Details** menu and the record details for an applicant (eg referee information).

1. Applicant Details

Core Portal > Recruitment > Applicant Details

1. Access **Applicant Detail** from the **Recruitment navigation** menu.
2. **Applicants** widget is displayed - this is a quick access to a list of all applicants.
3. **Search** or **filter** for an applicant.
4. **View all** opens the list of applicants to a full screen.
5. **Add applicant** is **not currently used** by the University.
6. **Details of an applicant** and an ellipsis with more options: View details, History, Talent Pool (not in use by the University).
7. **Widget navigation** – use the scroll bar to search up and down the list or use the page navigation arrows.

Search for an applicant

1. To find an applicant, search by their first or last name only. There is also the option to add a filter to your search. Filter options are:
    * Job Title
    * Language
    * Industry
    * Qualification
    * Years of experience from and Years of experience to – not used by the University.
2. Click the ellipsis (three dots) at the end of the applicant row.
3. Select **View Details**.
4. This opens the record for that applicant, an example of the screen name is: **Applicant Details – Joe Bloggs (A123456).**

2. Applicant Details record

The applicant details record holds the following information relating to the applicant:

Vacancy Detail

Search and view details of vacancies, for which this applicant has applied.

The ellipsis allows you to select to view the application form for the selected vacancy. This will open in a new browser window.

The **ADD TO VACANCY** option is used in certain situations when recruitment has not gone to plan. See the **Manage unplanned recruitment events** guide.

Emails Sent

You can view emails sent to the applicant for all vacancies they have applied to, that are within your security access. See the **Create and track applicant emails** guide.
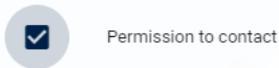
Referees

View a list of referees for this applicant. On the main Referee screen, you can see the vacancy ID, referee name, position, and their address, and also if applicant has given permission to contact them.

The ellipsis provides the option to:
- **View** – a read-only view of the referee's details.
- **Edit** – update or correct the referee's details. Remember to click **SAVE** to retain any changes.
- **Delete** – remove all their information from this applicant. A confirmation message will appear to be sure you wish to delete this referee.

Use the **ADD** button to add a referee to this applicant:
1. Click **ADD**.
2. Select the vacancy ID from the drop-down.
3. If they have given their permission to be contacted, tick the permission box.
4. Complete all relevant fields, for the details you have, in the following sections: **Name**, **Employment Details**, **Contact**, and **Address**.
5. Click **SAVE**. A green success message will appear - wait for the dark green line to fill.

Events

View and complete applicant events, as required. See the **Manage a successful applicant** guide.

Documents

You can manually add and upload documents to their application. See the **Generate shortlisting packs and screen applicants** guide.