

This guide covers how to record your shortlisting/ selection/ interview panel members in the Recruitment Portal. There are links throughout this guide to sections within it, and external links to helpful web pages.

This guide covers the following process steps:

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1. Panel members



Note* The Interview Panel relates to the 'Selection Panel' that will be involved in the recruitment process. This does not necessarily mean that all members will take part in the actual interview(s). The Interview Panel can be entered before the vacancy is authorised. For advice, and links to recommended training for panel members, visit [Planning a recruitment](#) on the HR Support website.

Add interview panel members

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

1. Click **INTERVIEW PANEL** from the left-side menu to reveal further menu options.
2. Select **Interview Panel**.
3. Click the **ACTIONS** button top right corner.
4. Select **Add Interviewer**.



Note* The **ACTIONS** button on this screen, **Generate Letter** and **Generate Email** are not in use.

5. Enter the details of the first panel member into the fields displayed:

Field name (* mandatory)	Description
Interviewer Type *	Select from the drop down list the interviewer type relevant for that panel member: <ul style="list-style-type: none">• Chair – leads the recruitment and responsible for recruiting the best candidate in a fair and transparent way.• External – eg a contractor, someone who is not a University employee.• Internal – University employee.• Observer – has no involvement or say in the interview process (eg observing for work experience).
Employee	Only complete this field if the interviewer is internal. Using the drop down you can search and select the employee. Search using name or personnel number. Selecting an employee will populate the following fields: <ul style="list-style-type: none">• Title• Forename*• Surname*• Legal Sex*• Email*• Address Type*
Title	Select from the drop-down the individual's title.
Forename *	Free text box, enter the individual's name, make sure it is spelt correctly.
Surname *	Free text box, enter the individual's name, make sure it is spelt correctly.
Legal Sex	Select from the drop-down options. To meet Equality and Diversity monitoring requirements, please ensure the gender field is completed for external panel members.

Phone No.	Free-text box for their contact number. It is not mandatory, but it is sensible to record one.
Extension	Free text box to include their internal extension number.
Email	Free text box to capture the email address for all interviewer types.
Address Type *	There are two to select from the drop down: <ul style="list-style-type: none"> • Work Address – select this for internal staff, including if they are the chair or observer. • Interview Panel Address – select this for external individuals, including if they are an observer or chair.
Country *	Start to type the name of the country in the field and then select from the shortened list.
Address fields	Several address fields appear once you have selected the country. The first two lines of address are mandatory for external panel members.


6. Click **SAVE**.
7. Repeat steps 3 to 6 until all panel members and others associated with the interview process have been added.

Note* Once all panel members are added you should ensure all the relevant Vacancy Events have been selected and recorded on the system:

- Selection panel members EO briefed.
- Selection panel training confirmed.

Follow the **Manage Recruitment statuses and events** guide for instructions on how to update vacancy events.

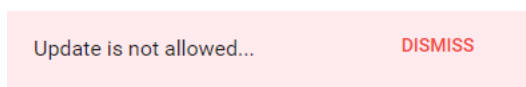
Manage panel member details

 **Note*** To edit incorrect or out of date details, the record will need to be deleted and added again.

View panel member details

Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > Edit Vacancy > Interview Panel

1. Select **Interview Panel** under the heading **INTERVIEW PANEL** from the left-side menu.
2. Search the row for the panel member whose details you wish to view.
3. Click on the ellipsis (three dots) at the end of that member’s row.
4. Select **Interviewer Details**.
5. The Interviewer Details screen will open, detailing the contact information for the panel member. Any changes made here and saved will result in the following error:



6. To exit click the white back arrow next to the title **Vacancy Details**.

Remove a panel member

Core Portal > Recruitment > Vacancies > Search for your vacancy > Actions > Edit Vacancy > Interview Panel

1. Select **Interview Panel** under the heading **INTERVIEW PANEL** from the left-side menu.
2. Search the row for the panel member's details you wish to view.
3. Click on the ellipsis (three dots) at the end of that member's row.
4. Select **Delete**.
5. A message will appear to confirm you wish to delete the panel member. Select **Yes**.

Delete

Are you sure you want to delete this?

NO **YES**

6. To exit click the white back arrow next to the title **Recruitment**.

2. Interview schedule

Interview schedules can be created and managed in CoreHR, including sending invites to interviews.

Create interview schedule

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

1. Click **SCHEDULES** from the left-side menu to reveal further menu options.
2. Select **Schedules**.
3. Click the **ADD SCHEDULE** button in the top right corner to open the **Schedule Details** screen.

Schedule Details
Recruitment > Vacancy Details: 145465 - Postdoctoral Research ... > Schedule Details

Schedule Assign Applicants Time Slots Interviewers

Details

Title* Venue Applicant Status* Assign By*

Schedule* Round*

Schedule

Start Date* End Date* Start Time* End Time*

Duration*

Further Information

Breaks

Morning Duration Lunch Duration

SAVE

4. Enter the details for the interview schedule under the **Schedule** tab:

Field name (* mandatory)	Description
Title *	Enter a title for the interview, eg Interviews for [job title].
Venue	Enter the name and details of the venue. Ideally you should enter the full address so that it can be merged into the interview invite letter/email.
Applicant Status *	Select ' Invited to Interview 1 '. This is the status you wish to set for applicants once they are assigned an interview slot.
Assign By *	Using the drop down, select the Assign Type. 'Individual' means the applicants arrive at their scheduled time; 'Group' means they arrive at the same time.
Schedule *	Select the round and schedule number, eg Schedule 1, Round 1. You can enter the number manually or use the up and down arrow.
Round *	
Start Date *	Add the date of the interview using either the calendar or enter as DD-MM-YY.
End Date *	Add the end date for the interview, this can be several days after the start date. Enter the interview date using the calendar or enter as DD-MM-YY.
Start Time *	Enter the time of the first interview (eg. 9:00) or select from the drop down. It is a 24-hour clock.
End Time *	Enter the time you expect the last interview to finish (eg 17:00) or select from the drop down. It is a 24-hour clock.
Lead Time	Enter the time required between each interview in minutes eg 15 minutes. It is recorded in minutes, alternatively use the up and down arrows to get to the correct lead time.
Duration *	Enter the length of each interview in minutes, eg 60 for a one-hour interview.
Further Information	There is a free text box to capture further information.
Breaks	For the panel you can add breaks by setting the time and duration for morning, lunch, and afternoon. The duration is in minutes. Add as appropriate.
Special Needs Vacancy	Not in use.
Select Interview Slot Online	Not in use.
Board Convenes	Record what time the Board need to meet prior to the first interview, eg first interview is at 9am, the board convenes at 08:30. Use the drop-down selection or type the time in.
Days	Not in use.

5. Click the **SAVE** button in the bottom right corner. A green success message will appear, wait for the dark green line to fill.



Note* If you receive the following warning message, double check that the times entered (start, end, breaks, board convenes etc) are all in 24-hour clock and break times are within the start and finish time of the interview. Select **DISMISS** and correct the error, click **SAVE** again.

The schedule end time must be after the start time. **DISMISS**

6. If your interview schedule spans many days, the **SPECIFIC TIMES** button will become available. See [View/ amend the interview schedule](#) section for more information.
7. If you are ready to assign interview times to applicants and interviewers, move on to the [Manage interview times](#) section of this guide.
8. If not click the white back arrow next to the title **Vacancy Details** to exit.

View / amend the interview schedule

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

1. Click **SCHEDULES** from the left-side menu to reveal further menu options.
2. Select **Schedules**.
3. Click the ellipsis (three dots) at the end of the row for the interview details you wish to view.
4. Select **View/Edit Schedule Details** to open the **Schedule Details** screen.
5. Next follow the appropriate guidance to either [view the details](#) or [amend the details](#).

View interview schedule details

1. In the Schedule tab view the details entered for the schedule, scroll as needed.
2. If available, click the **SPECIFIC TIMES** button to view the interview dates and start/end time.
3. To exit without making changes, either click the white back arrow until you are returned to the screen you want or select the screen title from the breadcrumbs.



Amend the interview schedule

1. Amend any details as necessary by either typing over or using the drop-down options as appropriate.
2. Click SAVE button.
3. A confirmation message will appear, noting that if you save the changes any assigned interview times will be unassigned.

Confirm

Are you sure you want to update this schedule?

This will unassign any existing applicant timeslots


NO **YES**

4. Click YES. A green success message will appear, wait for the dark green line to fill.

Alternatively, if available, click the **SPECIFIC TIMES** button to view the interview dates. Here you can edit timings of a specific interview day or delete an interview date.

Date	Starts On	Ends On	Board Convenes at	Morning	Lunch	Afternoon
13-OCT-20	09:00	16:30	08:45	11:30	13:30	
14-OCT-20	09:00	16:30	08:45	11:30	13:30	
15-OCT-20	09:00	16:30	08:45	11:30	13:30	
16-OCT-20	09:00	16:30	08:45	11:30	13:30	

1. Click the ellipsis and select:
 - Edit** – to amend the times for that interview date (start and end times, board convenes time, break times). Click **OK** to save changes.
 - Delete** – to remove that interview date from the schedule. A warning box will appear, click a response as appropriate.
2. On both occasions wait for the dark green line of the success message to fill before exiting.

 **Note*** Any changes to the interview schedule will affect already assigned interview times. You will need to reassign the interview dates and times to the selected applicants.

Exit by either clicking the white back arrow until you are returned to the screen you want, or select the screen title from the breadcrumb.



Delete the interview schedule

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

1. Click **SCHEDULES** from the left-side menu to reveal further menu options.
2. Select **Schedules**.
3. Click the ellipsis (three dots) at the end of the row for the interview details you wish to view.
4. Select **Delete**.
5. A message will appear to confirm you wish to delete the panel member. Select **Yes**.
6. To exit click the white back arrow next to the title **Recruitment**.

Delete

Are you sure you want to delete this?

NO
YES

3. Manage interview times

Assign interview times

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

1. Locate your interview and click on the ellipsis (three dots).
2. Select **View/Edit Schedule Details** to open the **Schedule Details** screen.
3. Interview times need to be assigned to both the shortlisted applicants and the interviewers.

Interviewers



Note* Interviewers must have been assigned as panel members before they can be assigned to the interviews. See section1.

1. Select the **Interviewers** tab.
2. If you have many panel members listed, you can search for the panel members one by one using their name.
3. In the **Assigned** column slide the toggle to the right to select the interviewer you wish to assign an interview time to. Pay attention to any navigation arrows below the **Assigned** column.
4. As you slide the toggle, a success message will appear for each assign, wait for the dark green lines to fill for each selected interviewer.
5. To unassign an interviewer, slide the toggle to the left. A success message will appear wait for the dark green line to fill.

Applicants



Note* All applicant statuses need to be up to date and accurate, ie 'Shortlisted' and 'Rejected after Shortlisting' at this stage. See **Manage Recruitment statuses and events** guide.

There are two options to assign interview times for applicants, system assigned time slots or manually assigned time slots. System assigned chooses the interview date and time for each selected applicant. Manual assignment allows you to choose the applicant for a specific interview date and time.

System Assigned

The screenshot shows the 'Schedule Details' page. At the top, there are tabs for 'Schedule', 'Assign Applicants' (1), 'Time Slots', and 'Interviewers'. Below the tabs is a search bar and a dropdown menu for 'All Statuses' (2). The main table lists applicants with columns for Name, Status, Date, Time, Assigned, and Invited. The 'Assigned' column contains toggle switches (3). On the right side, there is an 'ACTIONS' menu with options like 'Generate Document', 'Generate Email', and 'Assign Time Slots' (4).

1. Select the **Assign Applicants** tab (1).
2. It is best to filter by status if you have a high number of applicants. Select '**Shortlisted**' from the drop down next to **All Statuses** (2).
3. In the **Assigned** column slide the toggle to the right to select the applicants you wish to assign an interview time to (3). Your list of applicants may display over two pages, pay attention to any navigation arrows below the **Assigned** and **Invited** columns.
4. As you slide the toggle, a success message will appear for each assign, wait for the dark green lines to fill for each selected applicant.
5. Select the **ACTIONS** button and click on **Assign Time Slots** (4).
6. A green success message will appear to confirm the time slots have been assigned. Wait for the dark green line to fill.
7. If you filtered by status of '**Shortlisted**' the applicants will disappear from the list as their status automatically updates to '**Invited to Interview 1**' once assigned an interview date and time.
8. Change the status filter to **All Statuses** to see the interview dates and times, alternatively select the **Time Slots** tab.
9. Exit by either clicking the white back arrow until you are returned to the screen you want, or selecting the screen title from the breadcrumb.

The screenshot shows the breadcrumb navigation at the bottom of the page. It includes a back arrow, the title 'Schedule Details', and a breadcrumb path: 'Recruitment > Vacancy Details: 144989 - Postdoctoral Research > Schedule Details'. The 'Vacancy Details: 144989 - Postdoctoral Research' part is highlighted with a red box.

Manually assign

1. Select the **Time Slots** tab (1). Here you can see a list of available interview dates and times.
2. Paying attention to the **Applicant Name** column (2).
3. Identify the date and time you wish to assign and select the drop down in the **Applicant Name** column, a list of all applicants will appear (3).
4. Click on the person you wish to assign that interview date and time to (3).



Note* All applicants will appear in this list, including those rejected after shortlisting. You will need to know who to select for what date and time.

5. Each time you select a person for a date and time, a success message will appear for each assign, wait for the dark green lines to fill for each selected applicant.
6. More interview dates and times can be found using the page navigation arrows (4).
7. The selected applicants' statuses will automatically update to '**Invited to Interview 1**' once assigned an interview date and time.
8. Exit by either click the white back arrow until you are returned to the screen you want or select the screen title from the breadcrumbs.

View taken and available time slots

The taken time slots and remaining available interview times can be easily viewed from the Time Slots tab.

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

1. Locate your interview and click on the ellipsis (three dots).
2. Select **View/Edit Schedule Details** to open the **Schedule Details** screen.
3. Click on the **Time Slots** tab.

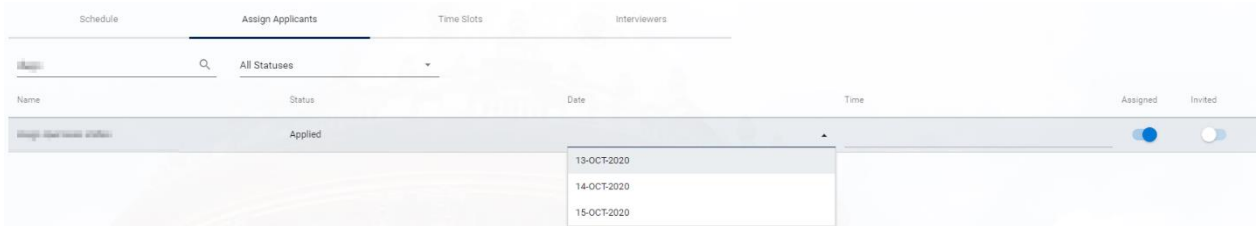
- Interview dates and times are listed, those with a blank listing in the **Applicant Name** column are available to assign to an applicant.

Change interview times

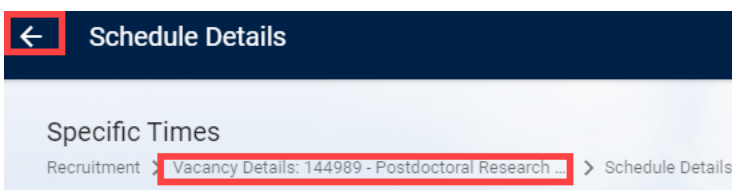
Follow these steps to change the day and/or time for any of your applicants after creating the schedule, eg if your first candidate has a long journey and would like a later interview time.

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

- Locate your interview and click on the ellipsis (three dots).
- Select **View/Edit Schedule Details** to open the **Schedule Details** screen.
- Click on the **Assign Applicants** tab.
- Search for your applicant using their name.
- Slide the toggle in the **Assigned** column to the left to unassign their current interview date and time. A success message will appear, wait for the dark green lines to fill.
- In the **Assigned** column slide the toggle to the right to select the applicant again, another success message will appear, wait for the dark green lines to fill.
- In the **Date** column select from the drop-down the new interview date. Only remaining available dates will be listed.



- In the **Time** column, do the same, select from the drop-down the new interview time. Only available times for that selected date will show.
- Click elsewhere in the screen, a success message will appear, wait for the dark green lines to fill.
- The new interview date and time has been set.
- Exit by either clicking the white back arrow until you are returned to the screen you want, or selecting the screen title from the breadcrumb.



Remove an applicant from an interview

On occasion applicants invited to interviews may pull out before the interview takes place. It is important to remove them from the interview schedule.

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

- Locate your interview and click on the ellipsis (three dots).
- Select **View/Edit Schedule Details** to open the **Schedule Details** screen.
- Click on the **Assign Applicants** tab.
- Search for your applicant using their name.
- Slide the toggle in the **Assigned** column to the left to unassign them from the interview schedule. A success message will appear, wait for the dark green lines to fill.

6. Their applicant status will revert to what it was before they were invited to interview. It is important to update this to the correct applicant status. Follow the **Manage Recruitment statuses and events** guide to do this.

4. Next steps

1. Follow the **Generate and download letters and forms in CoreHR** guide to send letter invites and rejection letters to relevant applicants,
2. Alternatively, follow the **Create and track applicant emails** guide to send the email equivalent.
3. Follow the **Manage Recruitment statuses and events** guide to update the vacancy status and check all applicant statuses are reflected correctly for this stage of the process.
4. Also using the **Manage Recruitment statuses and events** guide check that all vacancy events are up to date.