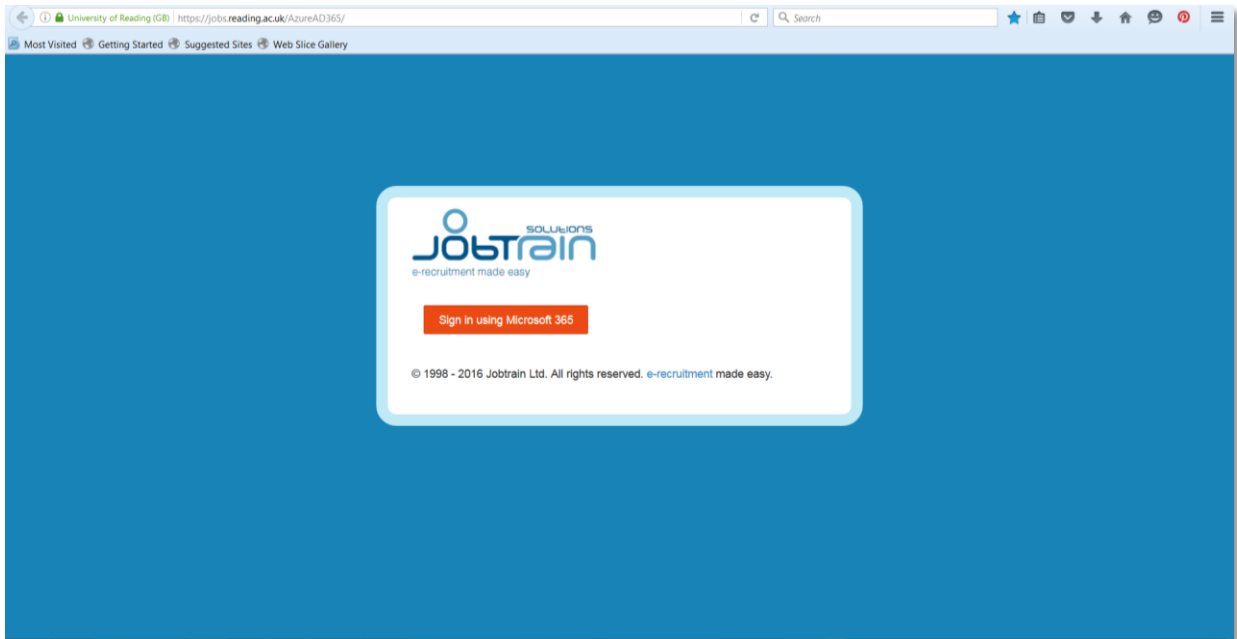


Online Panel shortlisting

1. Go to <https://jobs.reading.ac.uk/client/>

We would recommend using the latest version of Internet Explorer or Google Chrome.

The following screen will be shown



2. Click on 'Sign in using Microsoft 365'

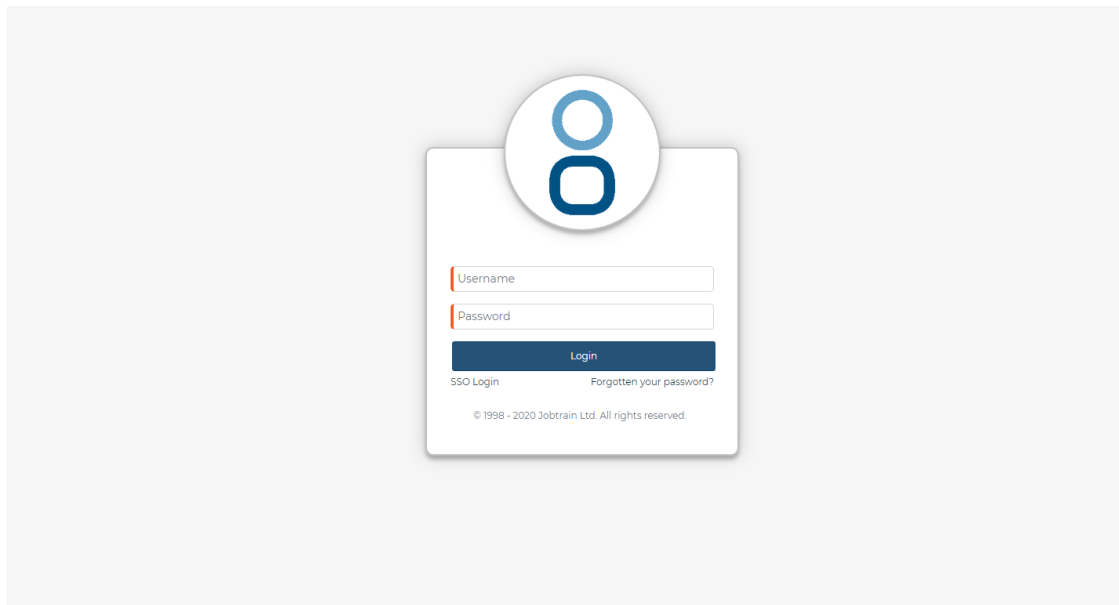
If you have not already logged into Microsoft 365 using another application, the following screen may be shown.

If this screen is shown, please enter your **[username]@reading.ac.uk** email address

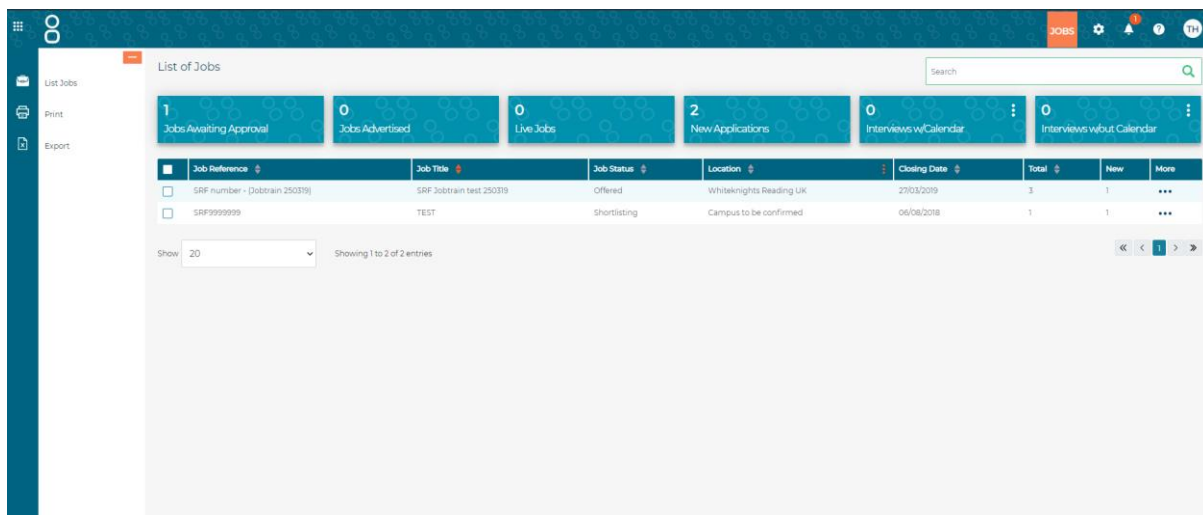
Then click 'Login'

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3. The following screen will be shown:



The vacancies that you have been given access to will be shown here.

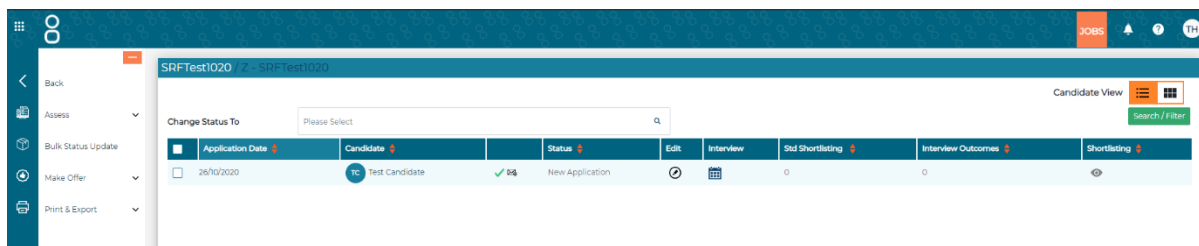
4. Hover over the job you wish to view the candidates for until its borders become green and click on it.

	Job Reference	Job Title	Job Status
<input type="checkbox"/>	SRF9999999	TEST	Shortlisting
<input type="checkbox"/>	Z - SRFTest1120	SRFTest1120	Shortlisting
<input type="checkbox"/>	Z - SRFTest1020	SRFTest1020	Shortlisting







This will display a list of all candidates that have applied for the role.

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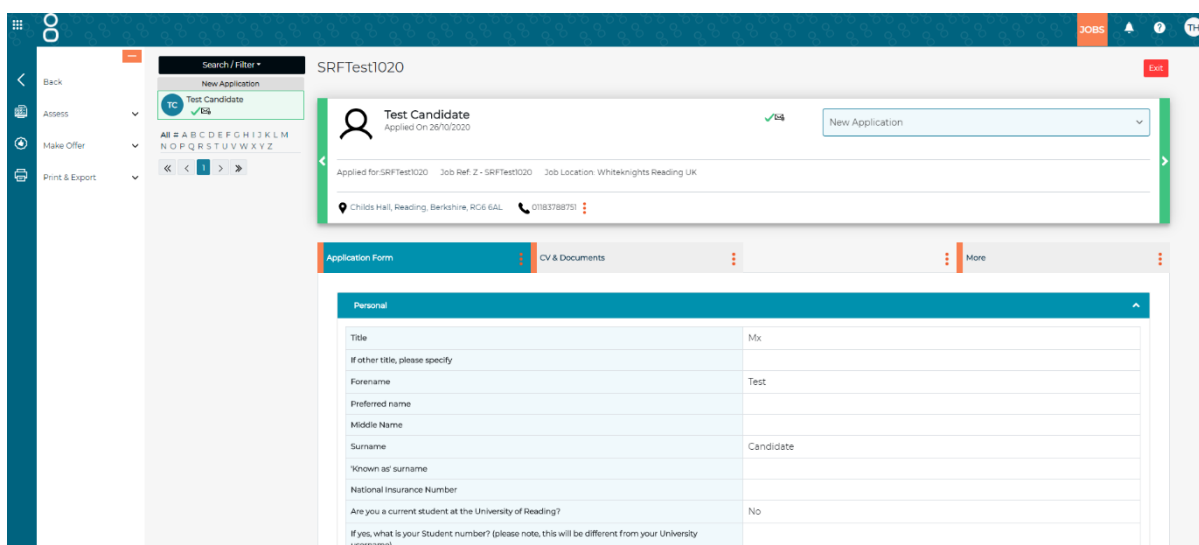
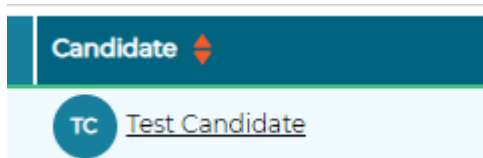
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The following symbols may appear next to the names:

-  Candidate is a current employee (internal application).
-  Candidates who have passed pre-assessment questions against the job.
-  Candidates who have failed pre-assessment questions against the job.
-  An email has failed to send to the candidate.
-  Candidate has been added manually
-  There is an attachment to the application. If a candidate has this next to their name, it is important to click on the paperclip icon to take you to the Supporting Documents page.

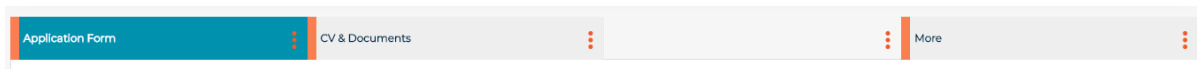
5. Click on the **candidate's name** to display their individual record.



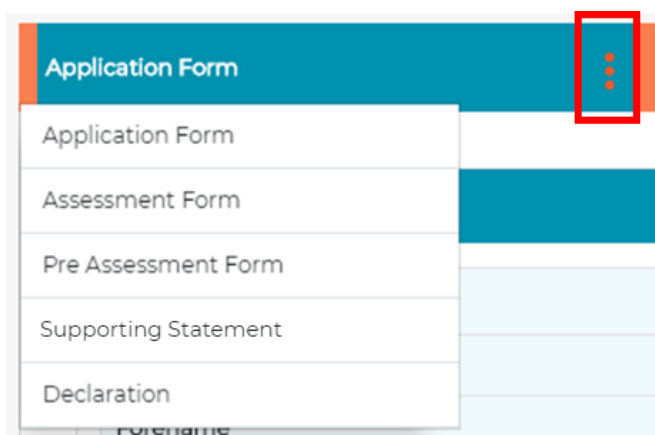
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The previous tabs of personal, education, employment and references tab are now all under the Application Form tab.



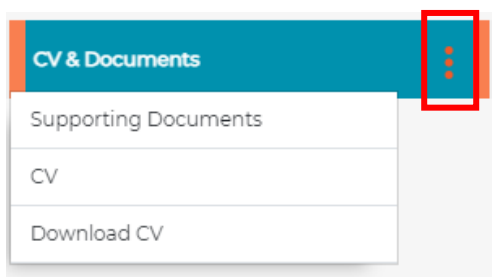
The 'Additional Information' tab can now be found by selecting the three dots on the "Application form" tab and then selecting "Additional Info" in the dropdown.



If you have arranged with your HR Coordinator to have pre-assessment questions and/ or an assessment form, then you can also find the candidate responses here as well.

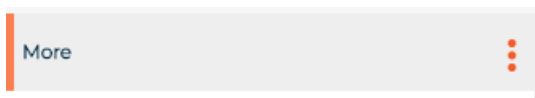
You can toggle back to the "Application Form" using the same method.

Where a CV or additional supporting documents have been included, the "CV & Documents" tab will show.



The CV will show when you click on the tab, but to see other supporting documents click on the three dots to bring the drop-down list to select these.

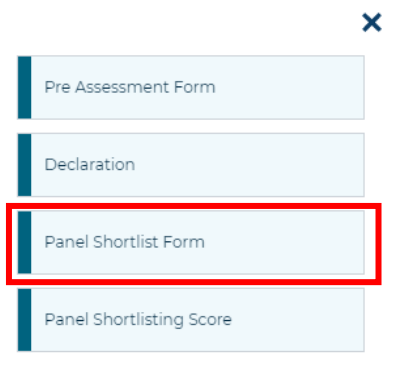
6. To record your feedback on the application, click on 'More' in the candidate's application



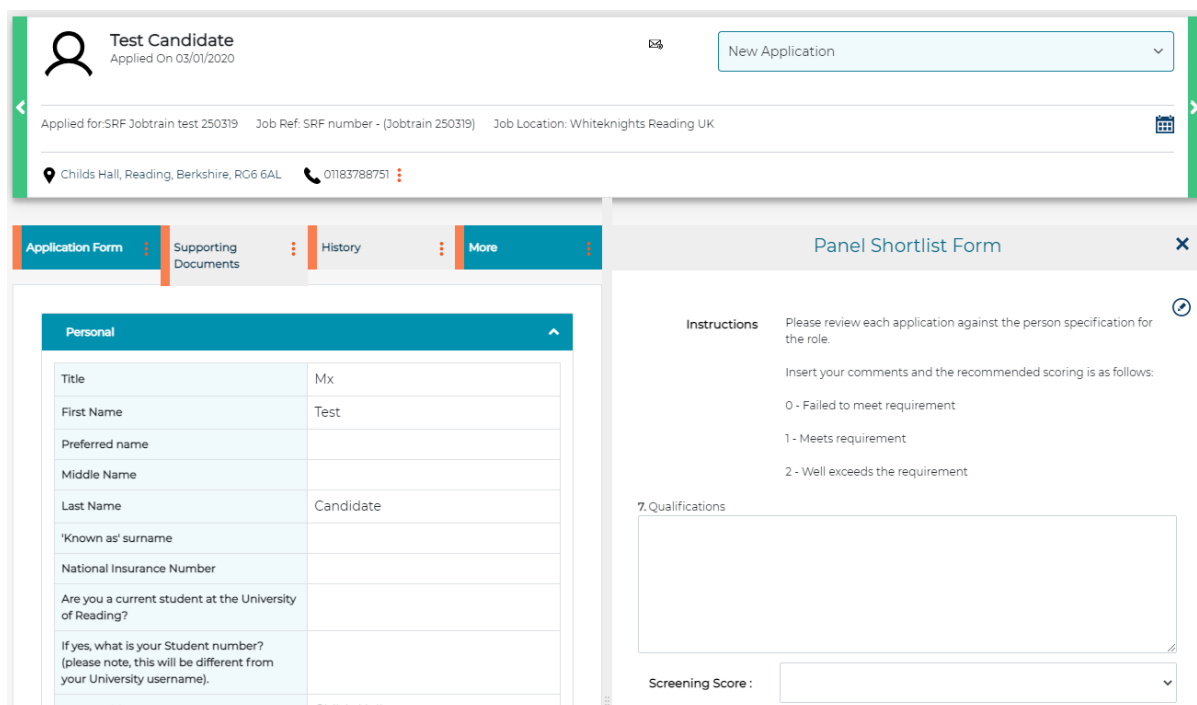
Recruitment ATS: Jobtrain

HIRING MANAGERS GUIDANCE

And then select Panel Shortlist Form in the window that opens



This will bring up the Panel Shortlist Form next to the application



The screenshot shows a candidate profile for 'Test Candidate' applied on 03/01/2020. The application details include: Applied for: SRF Jobtrain test 250319, Job Ref: SRF number - (Jobtrain 250319), Job Location: Whiteknights Reading UK, and address: Childs Hall, Reading, Berkshire, RG6 6AL. The interface has tabs for 'Application Form', 'Supporting Documents', 'History', and 'More'. The 'Panel Shortlist Form' is open, showing instructions to review applications against person specifications and provide a score. The score scale is: 0 - Failed to meet requirement, 1 - Meets requirement, 2 - Well exceeds the requirement. There is a '7. Qualifications' section with a text area and a 'Screening Score' dropdown menu.

To write on the form select the following icon 

7. Go through the form whilst reviewing the application and write comments where required and give a score to each criterion as follows:

0 = Failed to meet requirement; 1 = Meets requirement; 2 = Well exceeds requirement.

Please note: Constructive comments related to the job description and person specification on each application must be recorded in the system, so there is a record of the feedback in the event of a query from a candidate. If requested, the comments recorded in the system will be shared with the candidate, so please bear this in mind when commenting on the applications.

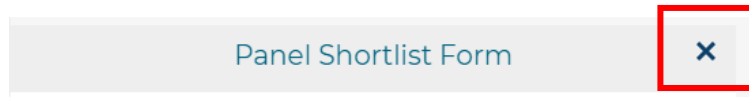
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When completed, click 'Save' under the last criterion at the bottom of the form.

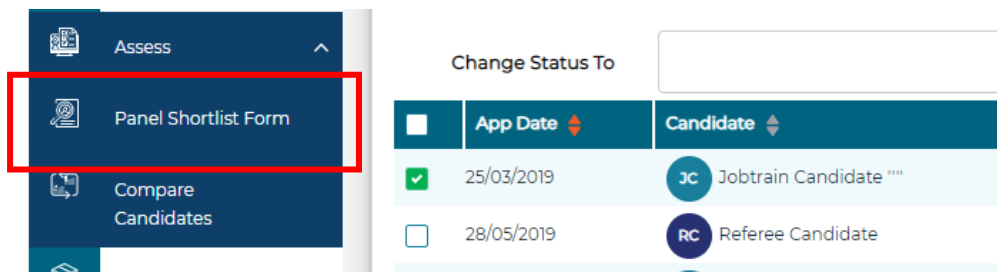


Click the X to the right of the Panel Shortlist Form heading to come out of this form.



If you need to edit the form, re-open the form as under step 6 and make the required amendments before saving the form again.

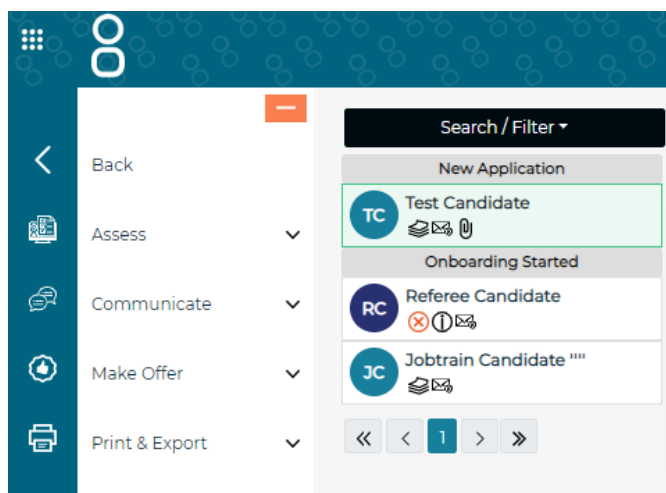
Alternatively, to amend the form select the required candidate with a green tick, open the drop down under 'Assess' on the left-hand side and select 'Panel Shortlist Form'.



Please note: These forms can either be completed by shortlisters independently, or if a shortlisting meeting is held by one person on behalf of the panel.

Please advise your HR Coordinator which option you will be going with.

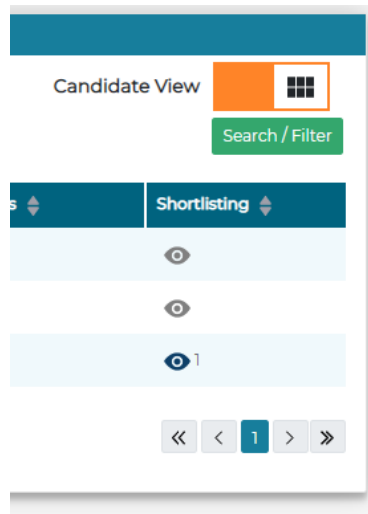
8. If you have multiple candidates, move onto the next candidate on the list by clicking on the list of names on the left-hand side and repeat the process above for each application.



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Once all members of the Panel have completed the shortlisting, the icon under Shortlisting Score will change from grey to blue and the total score given to each candidate will be shown on the list of candidates:



You can now sort the shortlisting scores by clicking on the arrows next to the shortlisting heading



If you want to compare one candidate's scores and comments, this can be accessed by clicking on the blue icon under 'Shortlisting Score'.

App Date	Candidate	Status	Edit	Interview	Standard Shortlisting	Interview Outcomes	Panel Shortlisting
03/01/2020	TC Test Candidate	Onboarding Started			0	0	3.0

The following screen will appear:

Panel shortlisting

Candidate: Test Candidate Job: SRP-Jobtrain test 250319

Compare	Form	Completed By	Status	Completed On	Score	View
<input type="checkbox"/>	Shortlisting - Grades 1-5	Katy Lamson	COMPLETE	25/06/2020	2	
<input type="checkbox"/>	Shortlisting - Grades 1-5	Test HM	COMPLETE		1	View/Edit

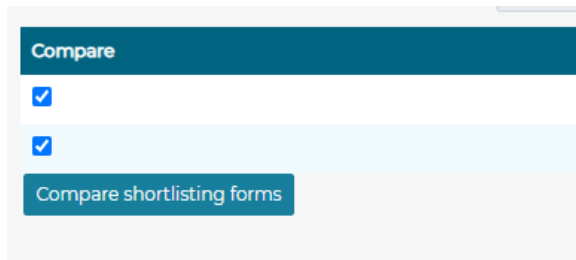
Compare shortlisting forms

Back

Recruitment ATS: Jobtrain

HIRING MANAGERS GUIDANCE

To compare comments given by each Panel member, select the relevant shortlisters under 'Compare' and then click on Compare Shortlisting Forms and the following screen will appear:



Compare panel shortlisting

Candidate: Test Candidate

Job: SRF Jobtrain test 250319

No	Question	Response	Score
1	Qualifications		
	Katy Lanxon		
	-		1
	Test HM		
	Has required qualifications		1
2	Relevant experience		
	Katy Lanxon		
	-		1
	Test HM		
	No experience in relevant areas		0

Back

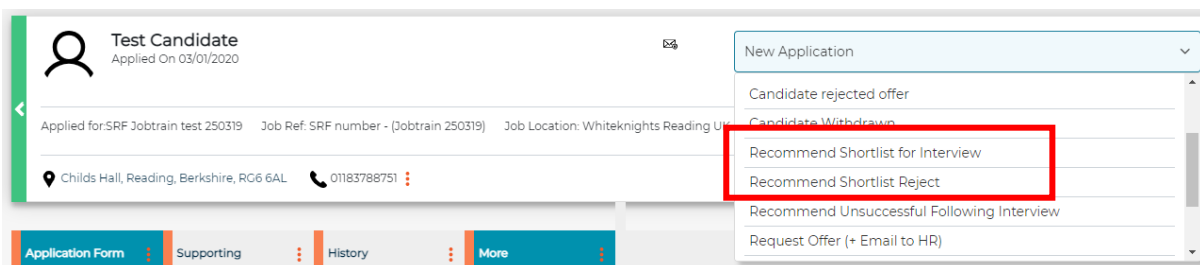
9. To confirm the shortlisting decisions, you will need to change the candidate statuses.

To reject a candidate at this stage, change the status to **Recommend Shortlist Reject**

To shortlist a candidate for interview, change the status to **Recommend Shortlist for Interview**

If you have reserve candidates, change their status to **Reserve (shortlist)**

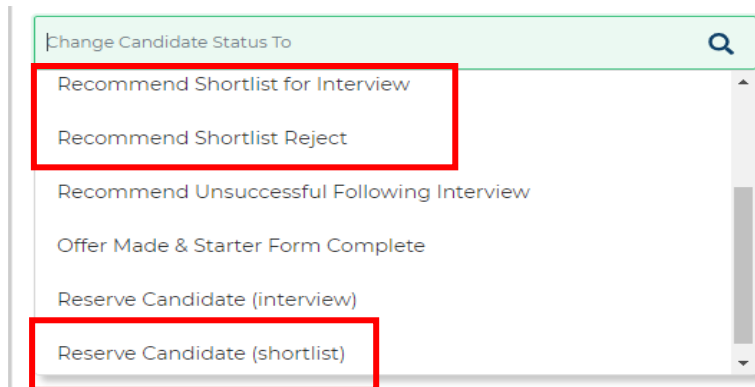
You can change the status of each candidate by either selecting from the drop down in the application as below:



Recruitment ATS: Jobtrain

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Or in the main candidate list, tick the candidates you wish to change the status for and click on the 'Change Status to' box (below the job title) and select the appropriate status as below:

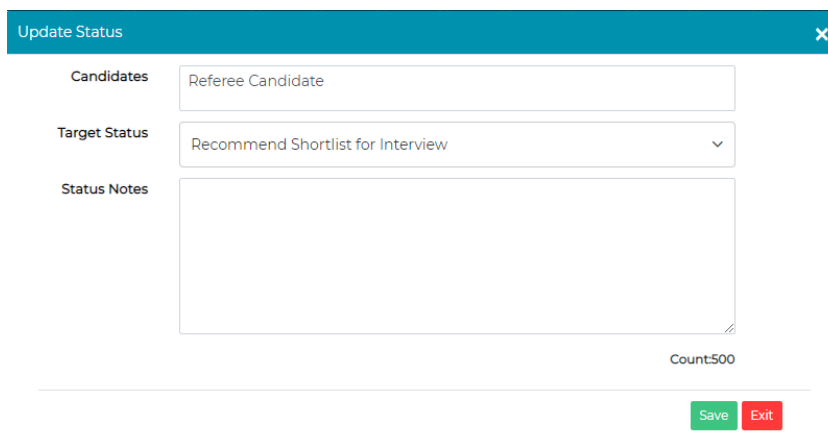


Please note: Any changes to a candidate's status should only be made by the Chair once shortlisting is complete, or their delegate.

When the status is changed, the system will generate the following 'Update Status' box.

You do not need to add any notes here.

Click 'Save' and it will take you back to the list of candidate names.

A screenshot of the 'Update Status' form. The form has a teal header with the title 'Update Status' and a close button. It contains three main sections: 'Candidates' with a text input field containing 'Referee Candidate'; 'Target Status' with a dropdown menu showing 'Recommend Shortlist for Interview'; and 'Status Notes' with a large text area. At the bottom right of the text area, it says 'Count:500'. Below the form are two buttons: a green 'Save' button and a red 'Exit' button.

There is now a function on Jobtrain to allow you to change candidate statuses in a bulk manner, which is helpful for campaigns where there are a large number of applications.

If this is something that you would like to use, please liaise with your HR Coordinator and they will be able to provide guidance.

Recruitment ATS: Jobtrain

HIRING MANAGERS GUIDANCE

When candidate statuses have been changed, please inform the HR Coordinator that shortlisting is finalised. They will then send interview invitations to the shortlisted candidates and request references if required.

The HR Coordinator will also send emails to the candidates not shortlisted and reserve applicants, so they have an update on their application.

END OF PROCESS