



Web Recruitment Release 4, January 2015
Generating correspondence

HR Systems



Contents

1. WEB RECRUITMENT – INTRODUCTION	2
1.1 OVERVIEW OF RECRUITMENT-RELATED SYSTEMS AND WEB RECRUITMENT RELEASES 1-3	2
1.2 RELEASE 4 OVERVIEW	3
1.3 HR SYSTEM LINKAGES	4
1.4 SYSTEM SUPPORT	4
2. WEB RECRUITMENT – AVAILABLE DOCUMENTATION	5
3. GENERATING ELECTRONIC REJECTION EMAILS AND LETTERS	6
STEP 1 – REJECT THE UNSUCCESSFUL APPLICANTS	6
STEP 2 – SET-UP THE CONTACT DETAILS FOR THE VACANCY	10
STEP 3 – OPTIONALLY CUSTOMISE THE REJECTION EMAIL	13
STEP 4 – CONFIRM THE REJECTION	17
5. USING MANUAL REJECTIONS OUTSIDE OF WEB RECRUITMENT	19
STEP 1 – REJECT THE UNSUCCESSFUL APPLICANTS	19
STEP 2 – COMPLETE THE VACANCY CONFIGURATION INFORMATION	23
STEP 3 – CANCEL THE REJECTION TASKS	26
STEP 4 – RECORD DETAILS OF HOW THE REJECTIONS WERE HANDLED	28
4. USING ELECTRONIC REFERENCES WITHIN WEB RECRUITMENT	31
4.1 GENERATING ELECTRONIC REFERENCE REQUESTS	31
4.2 OVERVIEW OF THE ELECTRONIC PROCESS FOR REFEREES	47
4.3 VIEWING RETURNED REFERENCES	51
6. REQUESTING REFERENCES MANUALLY	52
STEP 1 – SET-UP THE CONTACT AND REFERENCE INFORMATION FOR THE VACANCY	53
STEP 2 – IDENTIFY THE APPLICANT(S) AND INITIATE A REFERENCE TASK	59
STEP 3 – SET THE REFERENCE TASK TO MANUAL	64
STEP 4 – RECORD DETAILS OF THE CORRESPONDENCE SENT TO THE APPLICANT	66
STEP 5 – UPLOAD THE RETURNED REFERENCE	69
7. RECORDING OTHER CORRESPONDENCE AND VIEWING HISTORY	71
8. CANCELLING A CORRESPONDENCE TASK	74
9. SWITCHING A CORRESPONDENCE TASK BACK TO MANUAL	78

1. Web Recruitment – Introduction

1.1 Overview of recruitment-related systems and Web Recruitment Releases 1-3

The recruitment process begins with the identification and definition of a vacancy. This includes developing or updating the PD33 or role description and, for new academic-related and assistant staff vacancies, the grading of the post. Posts which are graded are set up in CHRIS (the HR and Payroll System) by the Grading team in the HR Division.

The new Recruitment Administration System (RAS) is then used to:

- Find the details of a vacancy which exists in CHRIS (posts which have been graded or are being refilled); or
- Enter the vacancy details for a new academic or research post (these are not individually graded so have not already been set up in CHRIS at this point).

Permission to fill a vacancy is then requested and granted in RAS.

In most cases, the vacancy should be advertised. Once all required permissions for a vacancy have been obtained, RAS can be used to place an advert on the University's Job Opportunities pages and to send to external media for publication.

In RAS, a department/institution records whether or not they will be inviting online job applications via the Web Recruitment System. Where the Web Recruitment System is to be used, RAS will:

- Insert an 'Apply online' button on the advert for the vacancy on the Job Opportunities pages;
- Insert a URL in external adverts for the vacancy, which routes to the relevant advert on Job Opportunities.

The Web Recruitment System can then be used to receive and process applications received.

The first release of the Web Recruitment System focused on:

- Allowing applicants to apply online via the University Job Opportunities pages;
- Automatically acknowledging applications;
- Allowing recruiters to view, email and print applications;
- Allowing recruiters/administrators to manage and record the results of the selection process; and
- Transferring the successful applicant(s) into the CHRIS Recruitment Module.

The second release of the Web Recruitment System focused on:

- Allowing applicants to copy personal details, qualifications and employment history from a previous application;
- Allowing recruiters to generate rejection emails and letters to applicants;
- Allowing recruiters to generate reference request emails and letters;
- Allowing referees to upload their reference into the system after a reference request email has been sent to them.

The third release of the Web Recruitment System focused on:

- Allowing recruiters to generate an email to the successful applicant where they need to provide information for a Tier 2 Certificate of Sponsorship;

- Allowing applicants to log back into their Web Recruitment account to enter the additional Tier 2 CoS information and upload supporting documents;
- Allowing recruiters to download the applicant details required for a Tier 2 CoS so that it can be attached to the rest of the CoS application for submission to HR;
- Automated marking of an application as eligible for purging 12 months after the vacancy closes (including extended deletion dates for those vacancies where CoS retention policies apply);
- Allowing super-users to mark a vacancy as a purging exception;
- Automated deletion of unsubmitted applications two months after the vacancy closing date;
- Retaining anonymised data for future trend analysis and management reporting;
- Allowing applicants to enter basic disclosure information when a vacancy has a basic disclosure check selected within new RAS;
- Generating reports of applicant information from within Web Recruitment and export results to Excel; and
- Adding bookmarks to the application pack PDF, allowing recruiters to navigate around more easily between applicants and documents.

1.2 Release 4 overview

Release 4 focuses on:

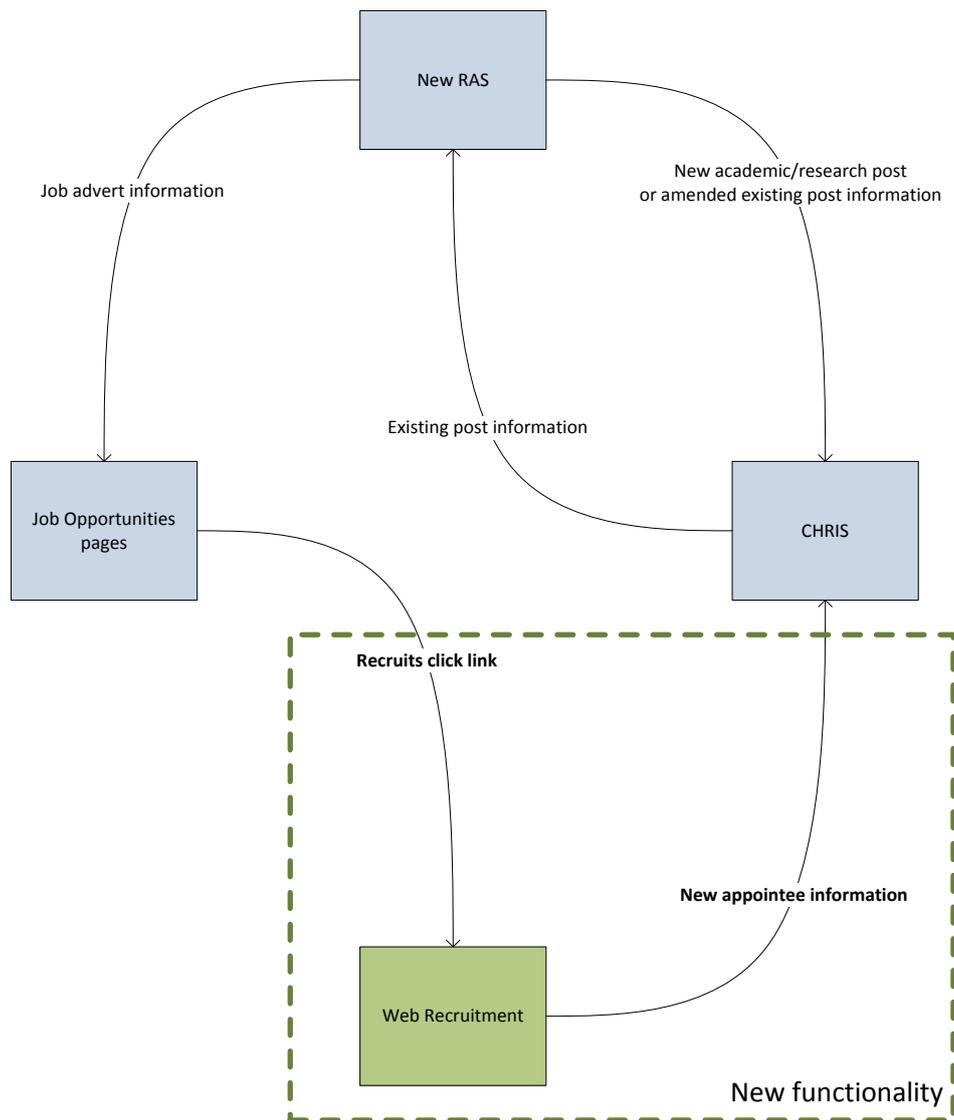
- Removing the need for vacancy administrators in departments/institutions to use the CHRIS Recruitment Module and CHRIS/10A form for the majority of appointments and replacing these with the following actions doing the following within Web Recruitment:
 - Recording details about the offer and appointment within a new Offers section;
 - Uploading supporting documents for an appointment (and Tier 2 Certificate of Sponsorship application, if required); and
 - Submitting an electronic Appointment Request to the HR New Appointment team.
- Pre-filling the Offers section with details about the applicant (from their online application form) and the position (from CHRIS);
- Allowing vacancy administrators to generate an offer letter to the successful candidate using details that they have entered into the system or upload an offer letter they have created outside of the system;
- Allowing vacancy administrators to download a cover sheet for any supporting documents being sent to the HR New Appointment Team outside of the system;
- Recording details of how and when offer letters were sent to the successful candidate;
- Storing and accessing offer letter history;
- Allowing the New Appointment Team to receive and view appointment requests online within a new HR Processing section of the system; and
- Allowing the New Appointments team to transfer details of the applicant and appointment into the CHRIS Recruitment Module.

Departments/institutions should request appointments via Web Recruitment wherever possible and the New Appointment team will transfer successful applicants to CHRIS using their screens within the system. The supporting documents cover sheet can then be downloaded and attached to supporting documents and returned to the HR New Appointment Team for processing.

1.3 HR system linkages

Diagram 1 below shows how the different HR systems link together in the recruitment process.

Diagram 1: HR systems linkages in the recruitment process



1.4 System support

Technical queries relating to the Web Recruitment System should be directed to the **CHRIS Helpdesk** by emailing chris.helpdesk@admin.cam.ac.uk. The New Appointment Team should be contacted for advice about making appointments via hrnewappointmentteam@admin.cam.ac.uk.

2. Web Recruitment – available documentation

This guide provides details of how to generate two forms of correspondence to applicants:

- Rejection emails and letters; and
- Reference requests.

It also includes details of how to record correspondence made outside of the Web Recruitment system. This manual (shaded in grey below) forms part of the wider set of documentation for Web Recruitment summarised in the table. These documents can be found on the [HR Systems Web Pages](#), along with additional supporting information (including links to videos and release notifications).

Title	Document Type	Description
Guide for Selectors	User guide	A guide designed for selectors that describes the process of logging on to Web Recruitment, viewing and downloading application packs.
Managing Vacancies	User guide	This is the main user guide, which explains how to find vacancies in the system, grant other access, download application forms, record outcomes at each stage of selection and complete recruitment so that the appropriate retention policy is applied to the details of the vacancy.
Tier 2 Certificate of Sponsorship – Requesting Applicant Details	Quick reference	This is a two page pictorial overview of the end-to-end process for requesting information from a successful applicant for a Tier 2 Certificate of Sponsorship (CoS) application. It is intended for users who do not require the level of detail provided by the step-by-step instructions in the user guide below.
Tier 2 Certificate of Sponsorship – Requesting Applicant Details	User guide	This guide provides detailed step-by-step instructions on how to request that a successful applicant logs back into their Web Recruitment account to provide information and supporting documents needed for a Tier 2 CoS application.
Generating Correspondence	User guide	This guide explains how to generate rejection emails/letters and reference request emails/letters within the system. It also details how to view references uploaded directly into the system by referees and how to upload references received by post/email.
Generating Reports	User guide	The Web Recruitment system provides standard vacancy reports for applicant and referee details (for example, for use in mail merges or for email lists). This document describes the standard reports and how to generate them. It also describes how to use the custom reporting tool built into the application.
Managing Offers	Quick reference	This is a two page pictorial overview of the end-to-end offer and appointment process. It is intended for users who do not require the level of detail provided by the step-by-step instructions in the user guide below.
Managing Offers	User guide	This guide describes the process of making an offer, generating an offer letter, recording offer outcomes and entering additional information so that an electronic appointment request can be made to the HR New Appointment team. This process replaces the need for departments/institutions to use the CHRIS Recruitment Module and CHRIS 10(A) form for most appointments. The guide also provides a summary of how to request Tier 2 CoS information; full details are in the CoS guide.
Overview of the Applicant Process	User guide	A guide for internal users of the Web Recruitment System that describes the process of making an online application from the applicant's perspective.
Applicant Frequently Asked Questions (FAQs)	FAQs	This document details common queries from applicants that have been reported through the CHRIS Helpdesk, in the applicant survey and to vacancy contacts within departments/institutions.
Administrator Frequently Asked Questions (FAQs)	FAQs	This document details common queries from recruiters, selectors and vacancy administrators reported through the CHRIS Helpdesk, in the department/institution benefits survey and system demonstrations.
Processing Appointment Requests	User guide	This guide is for the HR New Appointment team and describes how to find, check and process Appointment Requests from departments/institutions.



3. Generating Electronic Rejection Emails and Letters

There are four steps to this process:

- Step 1 – reject the unsuccessful applicants
- Step 2 – set up the contact details for the vacancy
- Step 3 – optionally customise the rejection email
- Step 4 – confirm the rejection correspondence

Note that the rejection will not be sent unless you have confirmed it under **Correspondence awaiting confirmation**.

The following steps describe the process.

Step 1 – Reject the unsuccessful applicants

- 1 Log in to the HR Admin Panel. The **Vacancies** Tab will display all the vacancies that you have access to.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AG04267	eProcurement Administrator (Chief Clerk)	Advert live	31-Jan-2015	0	Manage Vacancy	Administrator
AH04029	Research Associate	Advert live	31-Dec-2015	1	Manage Vacancy	Administrator
AH04031	Research Associate Test3	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04036	Research Associate SV TEST 1	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04233	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04235	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04238	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04240	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04242	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04251	Principal Research Associate	Advert live	08-Jan-2015	0	Manage Vacancy	Administrator

2. Locate the vacancy for which you wish to send rejection correspondence. Click on the **Manage Vacancy** button.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions
AH02327	Senior Clerk	Open	12-Apr-2014	0	Manage Vacancy
AM02263	Research Assistant	Open	11-Apr-2014	30*	Manage Vacancy
AW02219	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy
AW02269	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy

The Vacancy Overview screen will be displayed.

AH04339: Programming Officer[Non-Clinical-Research]

Vacancy overview

Finished recruiting? [Complete recruitment for this vacancy](#)

Welcome to the vacancy management area, from here you are able to:

- View and manage applications to this vacancy
- Handle rejection communications and reference requests
- Manage vacancy permissions
- View and confirm tasks relating to this vacancy
- Maintain vacancy notes and attachments

Applicant & referee report

Download an Excel workbook containing three worksheets: an applicant contact details list, a referee contact details list, and an applicant list without contact details.

Applicant & referee report

Positions available for this vacancy

The following positions can be appointed for this vacancy. If there are no positions listed, and it has been at least 24 hours since you set up this vacancy on RAS, please contact the CHRIS Helpdesk.

	Offer in progress?	Earliest start date
70033208: Programming Officer[Non-Clinical-Research]	Ravi Choudary	20-Jan-2015

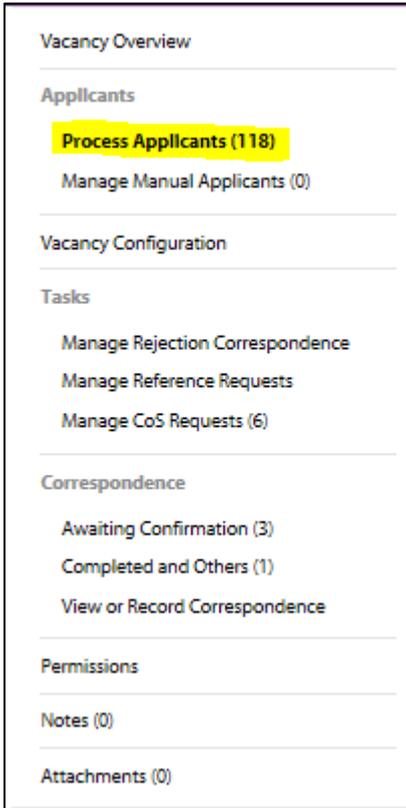
Application Stages
Media

Application Stages Overview



- Received
- Short Listing
- Selection One
- Selection Two
- Selection Three
- Committee/Board
- Offer

3. Click on **Process applicants**.



The screenshot shows a sidebar menu with the following sections and items:

- Vacancy Overview
- Applicants
 - Process Applicants (118)** (highlighted in yellow)
 - Manage Manual Applicants (0)
- Vacancy Configuration
- Tasks
 - Manage Rejection Correspondence
 - Manage Reference Requests
 - Manage CoS Requests (6)
- Correspondence
 - Awaiting Confirmation (3)
 - Completed and Others (1)
 - View or Record Correspondence
- Permissions
- Notes (0)
- Attachments (0)

4. Select the applicants you wish to reject and select the **Rejected** status from the drop down list.

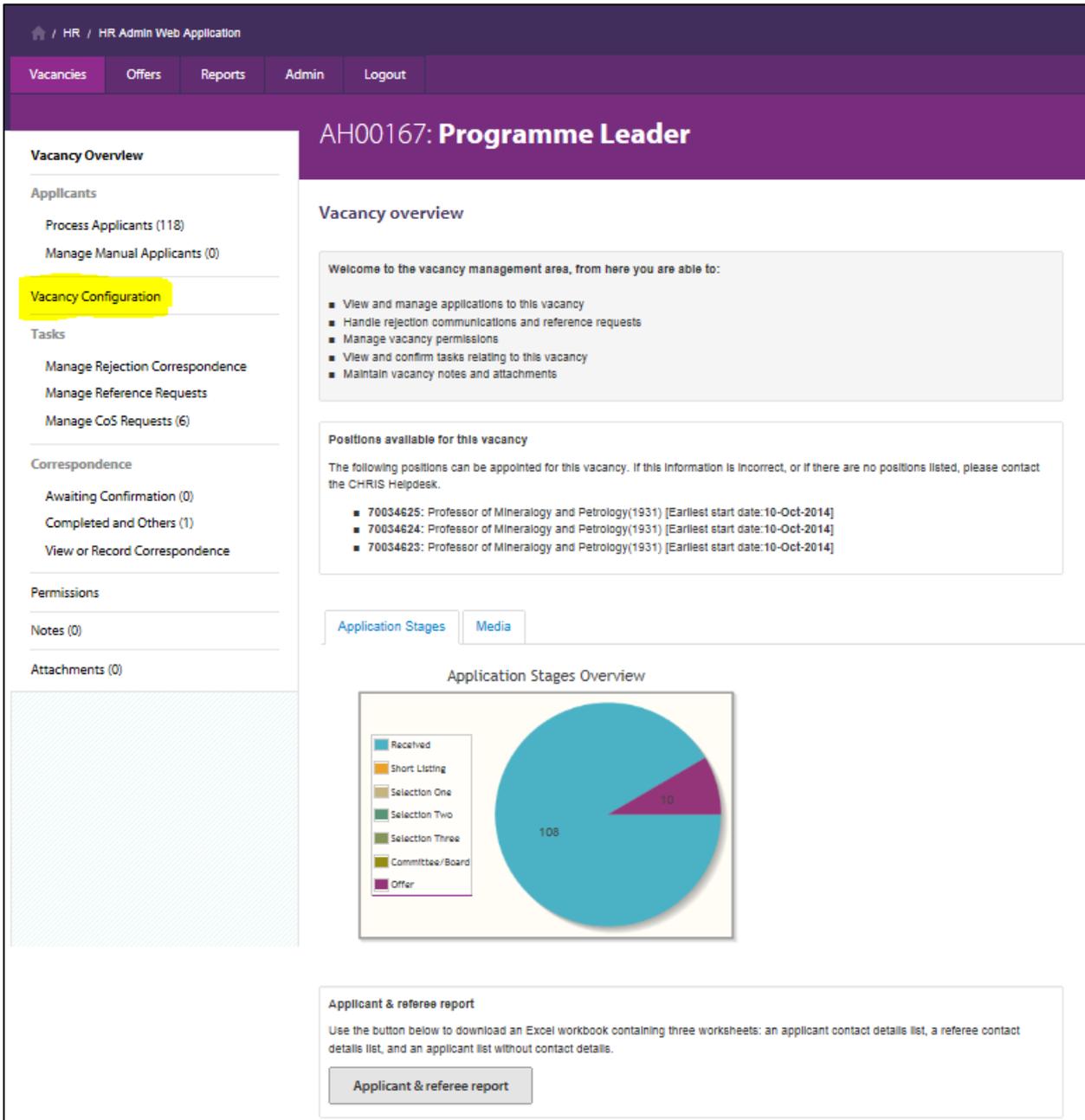
<input type="checkbox"/>	Candidate name ↕	Submitted ↕	Notes	Files	Actions	Status
<input type="checkbox"/>	Kanni, Sharath	19-Dec-2014 15:59:43	1*	0	Download	Active
<input checked="" type="checkbox"/>	Kapoor, Anil	19-Dec-2014 12:31:03	1*	0	Download	Active
<input type="checkbox"/>	Kapoor, Anil	19-Dec-2014 16:04:06	1*	0	Download	Active
<input checked="" type="checkbox"/>	Karamkanty, Ajay	19-Dec-2014 11:56:11	1*	0	Download	Active
<input type="checkbox"/>	Karamkanty, Ajay	19-Dec-2014 15:29:15	1*	0	Download	Active
<input type="checkbox"/>	Konda, Srikanth	19-Dec-2014 13:13:50	1*	0	Download	Active
<input type="checkbox"/>	Konda, Srikanth	19-Dec-2014 16:47:40	1*	0	Download	Active
<input type="checkbox"/>	Kumar, Mahesh	19-Dec-2014 13:22:24	1*	0	Download	Active
<input type="checkbox"/>	Kumar, Mahesh	19-Dec-2014 16:56:20	1*	0	Download	Active
<input type="checkbox"/>	Kumar, Rajesh	19-Dec-2014 14:30:50	1*	0	Download	Active

(3 of 11) [Navigation buttons] 10

5. Click **Apply**.

Step 2 – Set-up the contact details for the vacancy

Next select **Vacancy Configuration**.



The screenshot shows the HR Admin Web Application interface. The breadcrumb trail is 'HR / HR Admin Web Application'. The navigation menu includes 'Vacancies', 'Offers', 'Reports', 'Admin', and 'Logout'. The main header displays 'AH00167: Programme Leader'. On the left sidebar, 'Vacancy Configuration' is highlighted in yellow. The main content area is titled 'Vacancy overview' and includes a welcome message, a list of actions (View and manage applications, Handle rejection communications, Manage vacancy permissions, View and confirm tasks, Maintain vacancy notes), a section for 'Positions available for this vacancy' listing three professor roles, and an 'Application Stages Overview' pie chart. The pie chart shows 108 in the 'Received' stage and 10 in the 'Offer' stage. At the bottom, there is a section for 'Applicant & referee report' with a download button.

Enter the contact information for **All correspondence** for the vacancy. If you are an Administrator sending letters on behalf of a colleague then you may enter another person’s details into these fields.

General Configuration
All Correspondence
Reference Correspondence
Retention Policy

Configure Contact Information

Contact information is applicable to all correspondence. Details entered here will be included as the contact details for rejection and reference requests emails as well as the from fields of generated letters.

Your title *

Contact email address: *

Contact name: *

Address: *

Contact job title: *

Contact phone number: *

Mark Contact Configuration as complete?

Once the contact information is complete, ensure that you check the **Mark Contact Configuration as complete** check box and click on **Save Configuration**.

Mark Contact Configuration as complete?



Note that where you have previously entered contact information and have already generated correspondence which is awaiting confirmation, a confirmation message will be displayed to remind you that the amended contact information and that what you have entered will be applied to the existing tasks. You will need to click on **Yes** to confirm that you are aware of that and wish to proceed.



Confirm configuration

6 awaiting confirmation tasks exist on this vacancy.

- Configuration changes you have made will be applied to all awaiting confirmation tasks that exist on this vacancy.
- If you do not want the configuration changes to be applied, please click the **No** button and navigate to the **Awaiting Confirmation Page** to confirm all the awaiting confirmation tasks before you continue.

Do you wish to save the configuration and apply the changes to the pending tasks?

A confirmation message will be displayed.

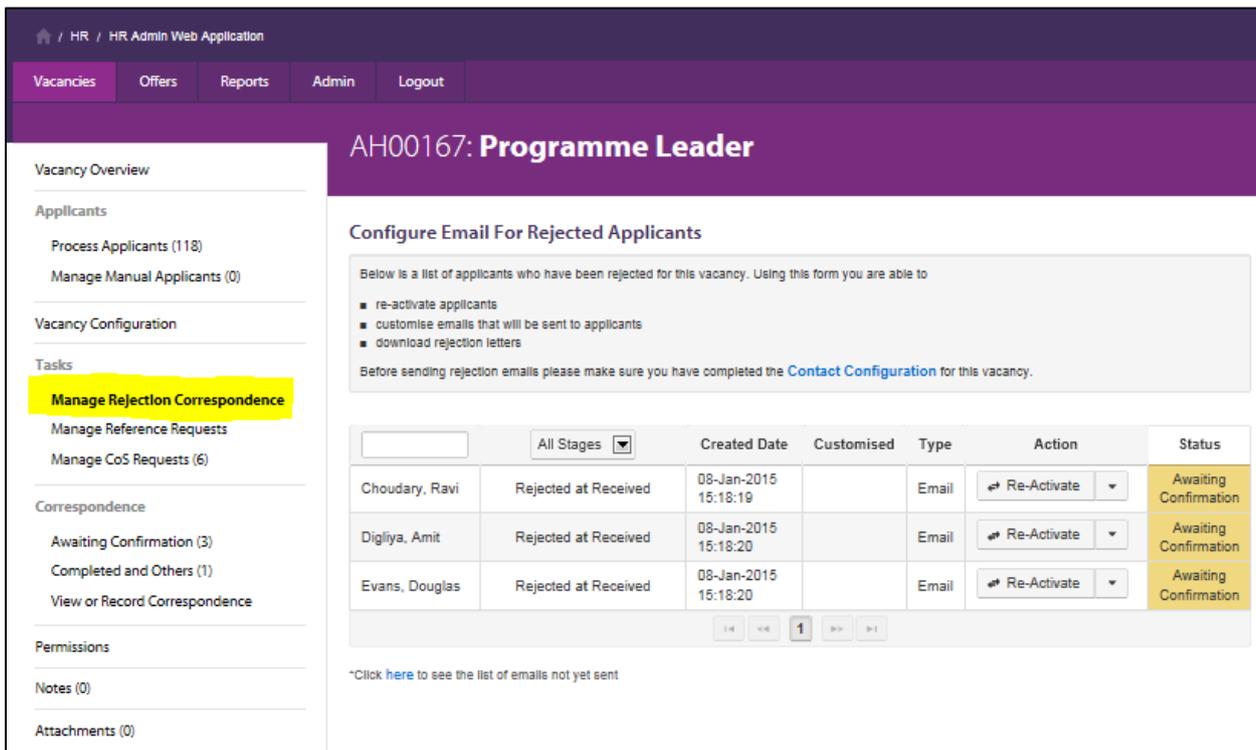
 **Information Saved**
The contact information has been saved

Contact Information Reference Correspondence

 **Information Saved** The contact information has been saved

Step 3 – Optionally customise the rejection email

Next, select **Manage Rejection Correspondence**. The applicants that have been rejected will be displayed.



HR Admin Web Application

Vacancies | Offers | Reports | Admin | Logout

AH00167: Programme Leader

Configure Email For Rejected Applicants

Below is a list of applicants who have been rejected for this vacancy. Using this form you are able to

- re-activate applicants
- customise emails that will be sent to applicants
- download rejection letters

Before sending rejection emails please make sure you have completed the [Contact Configuration](#) for this vacancy.

	All Stages	Created Date	Customised	Type	Action	Status
Choudary, Ravi	Rejected at Received	08-Jan-2015 15:18:19		Email	↔ Re-Activate	Awaiting Confirmation
Digliya, Amit	Rejected at Received	08-Jan-2015 15:18:20		Email	↔ Re-Activate	Awaiting Confirmation
Evans, Douglas	Rejected at Received	08-Jan-2015 15:18:20		Email	↔ Re-Activate	Awaiting Confirmation

*Click [here](#) to see the list of emails not yet sent

If you wish to tailor an individual rejection email, select the **Customise** option from the drop-down menu next to the Re-Activate button.



	All Stages	Created Date	Customised	Type	Action
Butler, Owen	Rejected at Received	19-Mar-2014 11:37:24		Email	↔ Re-Activate
Boardman, Matthew	Rejected at Received	19-Mar-2014 11:49:48		Email	✎ Customise
Andrews, Paul	Rejected at Received	19-Mar-2014 11:49:48		Email	📧 Preview
					📄 Download Letter

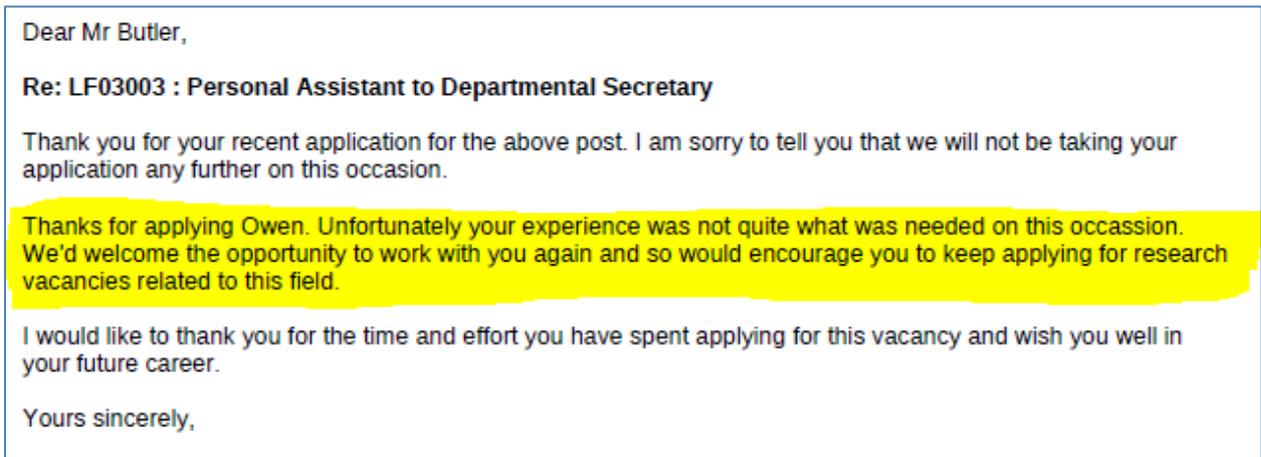
The **Customise Rejection Email** window will open to allow you to add an extra paragraph (which will become the second paragraph in the email) as required.

Type your text and click on the **Save** button.

If you do not need to tailor the email then the system will use the default correspondence template, including the data entered when you configured the correspondence for the vacancy where required.



This text will then be inserted into the rejection email/ pdf as shown:



Click on the **Preview** option to view a copy of the email.

	All Stages ▾	Created Date	Customised	Type	Action
Butler, Owen	Rejected at Received	19-Mar-2014 11:37:24		Email	↔ Re-Activate ▾
Boardman, Matthew	Rejected at Received	19-Mar-2014 11:49:48		Email	✎ Customise ✉ Preview ⬇ Download Letter
Andrews, Paul	Rejected at Received	19-Mar-2014 11:49:48		Email	

The **Correspondence Preview** window will be displayed.

Correspondence Preview

Task Details

- Status: **Awaiting Confirmation**
- Created Date: **19-Mar-2014 11:37:24**

Correspondence Details:

- To: **AjayKaramkanty@gmail.com**
- Subject: **Confidential: University of Cambridge - Information About your Application**

Dear Mr Butler

Re: AW02219 Research Associate

Thank you for your recent application for the above post. I am sorry to tell you that we will not be taking your application any further on this occasion.

I would like to thank you for the time and effort you have spent applying for this vacancy and wish you well in your future career.

Yours sincerely,

Hazel Turton

Training Manager

Please note that the wording of the rejection email/letter will also include the following sentence if you have rejected the individual at Selection Stage 1 or later:

If you would like to discuss this further or receive feedback, please contact Name on telephone number or via email address.

This is in accordance with the [Recruitment Guidance](#) which states that, due to high volumes of applications, it is University practice not to provide feedback to those rejected before being invited to an interview.

If you need to send a rejection letter outside the system (for example because an applicant has made a manual application and does not have an email address) select the **Download Letter** option from the drop down menu.



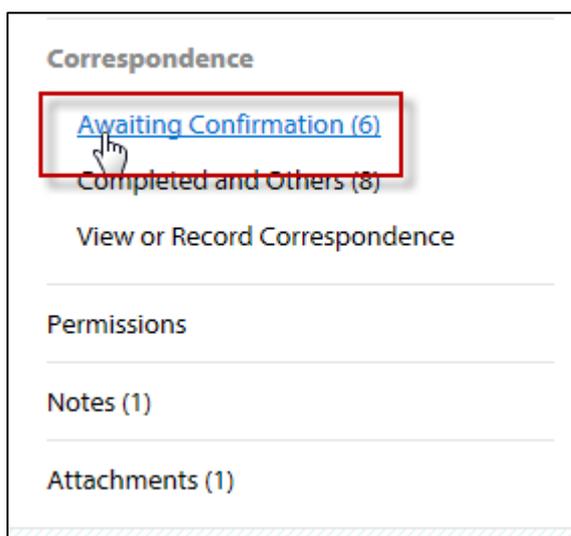
Select to **Open** the file in the pop-up window.



A PDF will open that you can print and post as appropriate.

Step 4 – Confirm the rejection

When you have completed any customisation of letters, navigate to the Correspondence option in the toolbar on the left-hand side of the screen and select **Awaiting Confirmation**.



Your rejection tasks will be displayed and you can preview the final copy of the emails using the **Preview** button in the Action column.

System Managed (4) Manual (0)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

	Applicant	Created By	All ▼	Created Date	Action
<input type="checkbox"/>	Boardman, Matthew	Turton, Hazel	Rejection Task	19-Mar-2014 11:49:48	Preview ▼
<input type="checkbox"/>	Andrews, Paul	Turton, Hazel	Rejection Task	19-Mar-2014 11:49:48	Preview ▼
<input type="checkbox"/>	Anderson, Chris	Turton, Hazel	Rejection Task	19-Mar-2014 11:49:48	Preview ▼
<input type="checkbox"/>	Butler, Owen	Turton, Hazel	Rejection Task	19-Mar-2014 11:37:24	Preview ▼

When you are satisfied with the correspondence generated, select the applicants and click the **Confirm Selected Tasks** button.

System Managed (4) Manual (0)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

<input checked="" type="checkbox"/>	Applicant	Created By	All <input type="checkbox"/>	Created Date	Action
<input checked="" type="checkbox"/>	Boardman, Matthew	Turton, Hazel	Rejection Task	19-Mar-2014 11:49:48	<input type="button" value="Preview"/> <input type="button" value="Preview"/>
<input checked="" type="checkbox"/>	Andrews, Paul	Turton, Hazel	Rejection Task	19-Mar-2014 11:49:48	<input type="button" value="Preview"/> <input type="button" value="Preview"/>
<input checked="" type="checkbox"/>	Anderson, Chris	Turton, Hazel	Rejection Task	19-Mar-2014 11:49:48	<input type="button" value="Preview"/> <input type="button" value="Preview"/>
<input checked="" type="checkbox"/>	Butler, Owen	Turton, Hazel	Rejection Task	19-Mar-2014 11:37:24	<input type="button" value="Preview"/> <input type="button" value="Preview"/>

(1 of 1) 10

Click the Yes button in the confirmation message to proceed with sending rejection emails to the selected applicants.

Confirm Correspondence

Are you sure you want to send correspondence emails to selected candidates ?

5. Using manual rejections outside of Web Recruitment

The Web Recruitment system automatically generates a rejection task when an applicant has been set to a status of 'rejected' at any stage of the selection process.

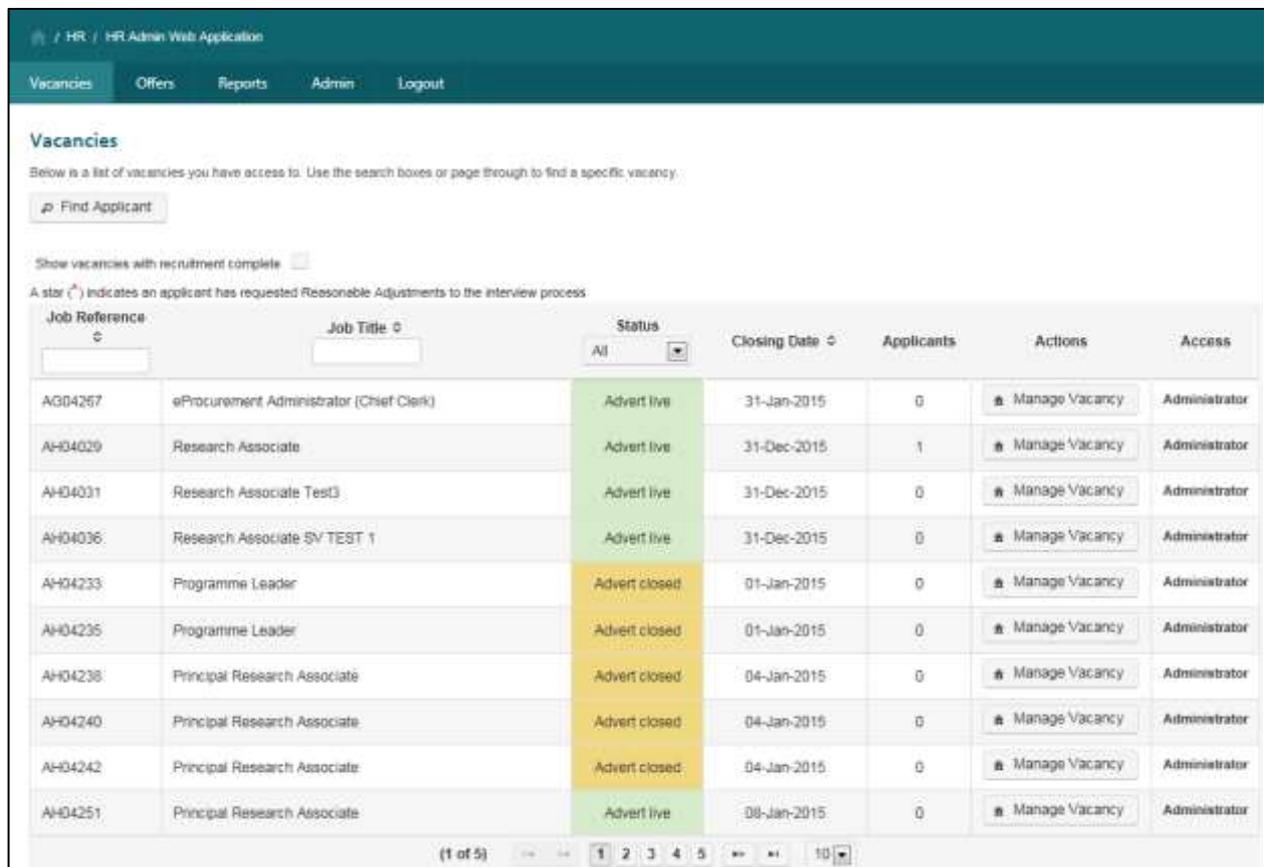
In the unlikely event that you need to cancel these tasks and send rejection details manually you should:

- Step 1 – Reject the unsuccessful applicants
- Step 2 - Complete the vacancy configuration information
- Step 3 – Cancel the rejection tasks
- Step 4 – Record details of how the rejections were handled.

These four steps are described in more detail below:

Step 1 – Reject the unsuccessful applicants

- 1 Log in to the HR Admin Panel. The **Vacancies** Tab will display all the vacancies that you have access to.



The screenshot shows the 'Vacancies' tab in the HR Admin Panel. It displays a table of job vacancies with the following columns: Job Reference, Job Title, Status, Closing Date, Applicants, Actions, and Access. The table contains 10 rows of data, with the first three rows having a status of 'Advert live' and the remaining seven rows having a status of 'Advert closed'.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AG04267	eProcurement Administrator (Chief Clerk)	Advert live	31-Jan-2015	0	Manage Vacancy	Administrator
AH04029	Research Associate	Advert live	31-Dec-2015	1	Manage Vacancy	Administrator
AH04031	Research Associate Test3	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04036	Research Associate SV TEST 1	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04233	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04235	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04238	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04240	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04242	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04251	Principal Research Associate	Advert live	08-Jan-2015	0	Manage Vacancy	Administrator

2 Locate the vacancy for which you wish to send rejection correspondence. Click on the Manage Vacancy button.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions
AH02327	Senior Clerk	Open	12-Apr-2014	0	Manage Vacancy
AM02263	Research Assistant	Open	11-Apr-2014	30*	Manage Vacancy
AW02219	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy
AW02269	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy

3 The Vacancy Overview screen will be displayed:

AH04339: Programming Officer[Non-Clinical-Research]

Vacancy overview

Finished recruiting? [Complete recruitment for this vacancy](#)

Welcome to the vacancy management area, from here you are able to:

- View and manage applications to this vacancy
- Handle rejection communications and reference requests
- Manage vacancy permissions
- View and confirm tasks relating to this vacancy
- Maintain vacancy notes and attachments

Applicant & referee report

Download an Excel workbook containing three worksheets: an applicant contact details list, a referee contact details list, and an applicant list without contact details.

Applicant & referee report

Positions available for this vacancy

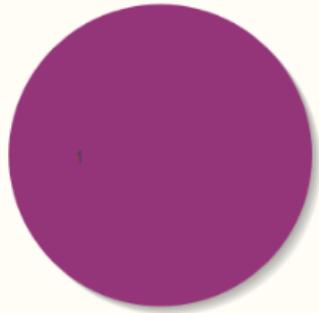
The following positions can be appointed for this vacancy. If there are no positions listed, and it has been at least 24 hours since you set up this vacancy on RAS, please contact the CHRIS Helpdesk.

	Offer in progress?	Earliest start date
70033208: Programming Officer[Non-Clinical-Research]	Ravi Choudary	20-Jan-2015

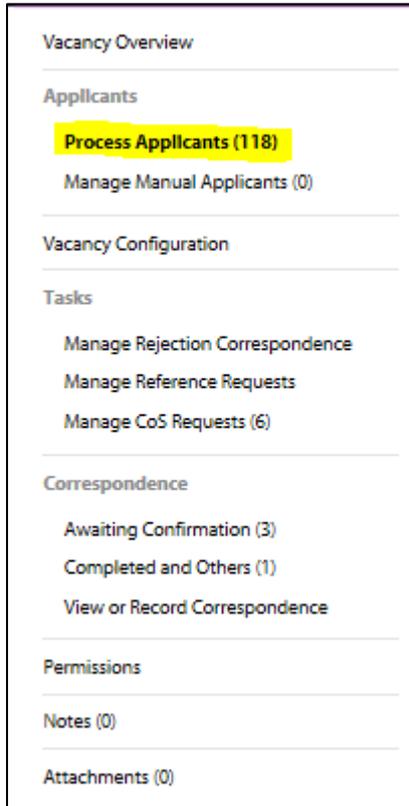
Application Stages
Media

Application Stages Overview

- Received
- Short Listing
- Selection One
- Selection Two
- Selection Three
- Committee/Board
- Offer



4 Click on **Process applicants**.



5 Select the applicants you wish to reject and select the **Rejected** status from the drop down list.

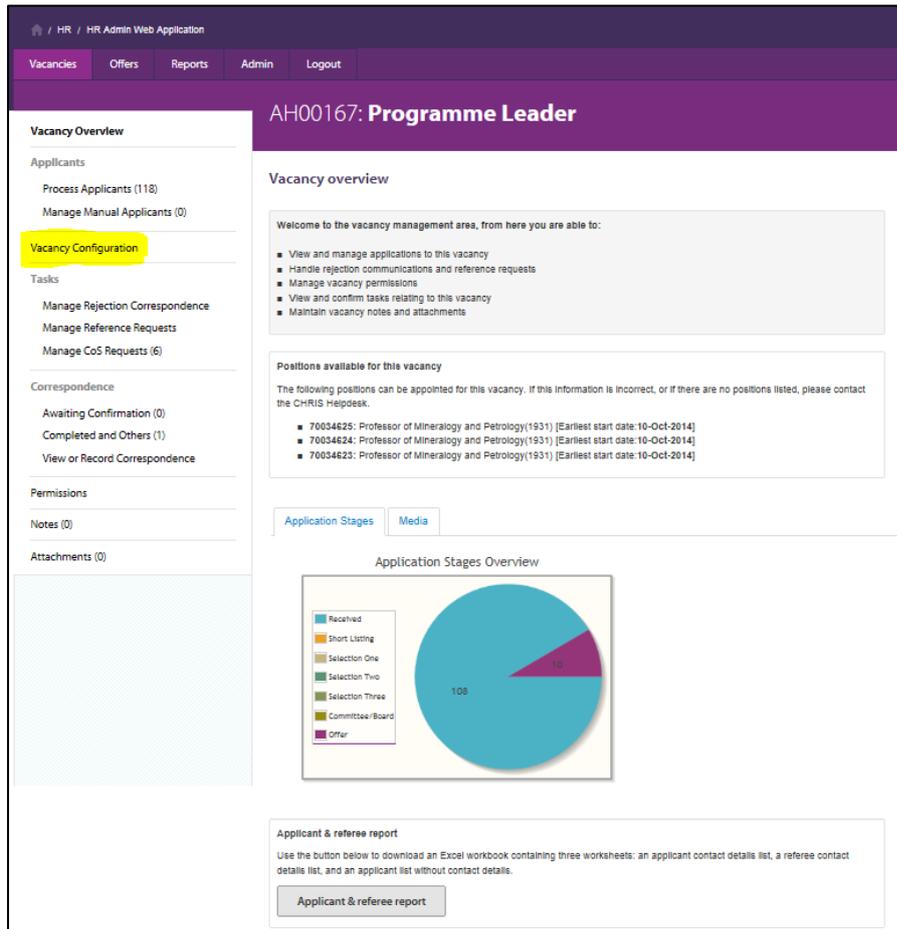
<input type="checkbox"/>	Candidate name <input type="text"/>	Submitted	Notes	Files	Actions	Status
<input type="checkbox"/>	Kanni, Sharath	19-Dec-2014 15:59:43	1*	0	<input type="button" value="Download"/>	Active
<input checked="" type="checkbox"/>	Kapoor, Anil	19-Dec-2014 12:31:03	1*	0	<input type="button" value="Download"/>	Active
<input type="checkbox"/>	Kapoor, Anil	19-Dec-2014 16:04:06	1*	0	<input type="button" value="Download"/>	Active
<input checked="" type="checkbox"/>	Karamkanty, Ajay	19-Dec-2014 11:56:11	1*	0	<input type="button" value="Download"/>	Active
<input type="checkbox"/>	Karamkanty, Ajay	19-Dec-2014 15:29:15	1*	0	<input type="button" value="Download"/>	Active
<input type="checkbox"/>	Konda, Srikanth	19-Dec-2014 13:13:50	1*	0	<input type="button" value="Download"/>	Active
<input type="checkbox"/>	Konda, Srikanth	19-Dec-2014 16:47:40	1*	0	<input type="button" value="Download"/>	Active
<input type="checkbox"/>	Kumar, Mahesh	19-Dec-2014 13:22:24	1*	0	<input type="button" value="Download"/>	Active
<input type="checkbox"/>	Kumar, Mahesh	19-Dec-2014 16:56:20	1*	0	<input type="button" value="Download"/>	Active
<input type="checkbox"/>	Kumar, Rajesh	19-Dec-2014 14:30:50	1*	0	<input type="button" value="Download"/>	Active

(3 of 11)

Click **Apply**.

Step 2 – Complete the vacancy configuration information

Select Vacancy Configuration:



The screenshot shows the 'Vacancy Configuration' page for vacancy AH00167: Programme Leader. The left sidebar contains a 'Vacancy Overview' menu with 'Vacancy Configuration' highlighted. The main content area includes a 'Vacancy overview' section with a welcome message and a list of tasks. Below this is a 'Positions available for this vacancy' section listing three professorial positions. An 'Application Stages Overview' pie chart shows 108 applications in the 'Received' stage and 10 in the 'Other' stage. At the bottom, there is an 'Applicant & referee report' section with a download button.

Enter the contact information for **All correspondence** for the vacancy. If you are an Administrator sending letters on behalf of a colleague then you may enter another person's details into these fields.

General Configuration
All Correspondence
Reference Correspondence
Retention Policy

Configure Contact Information

Contact information is applicable to all correspondence. Details entered here will be included as the contact details for rejection and reference requests emails as well as the from fields of generated letters.

Your title *

Contact email address: *

Contact name: *

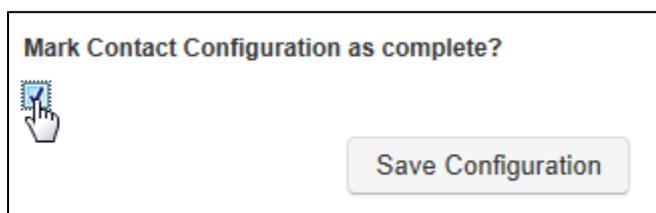
Address: *

Contact job title: *

Contact phone number: *

Mark Contact Configuration as complete?

Once the contact information is complete, ensure that you check the **Mark Contact Configuration as complete** check box and click on **Save Configuration**.



Note that where you have previously entered contact information and have already generated correspondence which is awaiting confirmation, a confirmation message will be displayed to remind you that the amended contact information and that what you have entered will be applied to the existing tasks. You will need to click on **'Yes'** to confirm that you are aware of that and wish to proceed.



Confirm configuration

6 awaiting confirmation tasks exist on this vacancy.

- Configuration changes you have made will be applied to all awaiting confirmation tasks that exist on this vacancy.
- If you do not want the configuration changes to be applied, please click the **No** button and navigate to the **Awaiting Confirmation Page** to confirm all the awaiting confirmation tasks before you continue.

Do you wish to save the configuration and apply the changes to the pending tasks?

A confirmation message will be displayed.

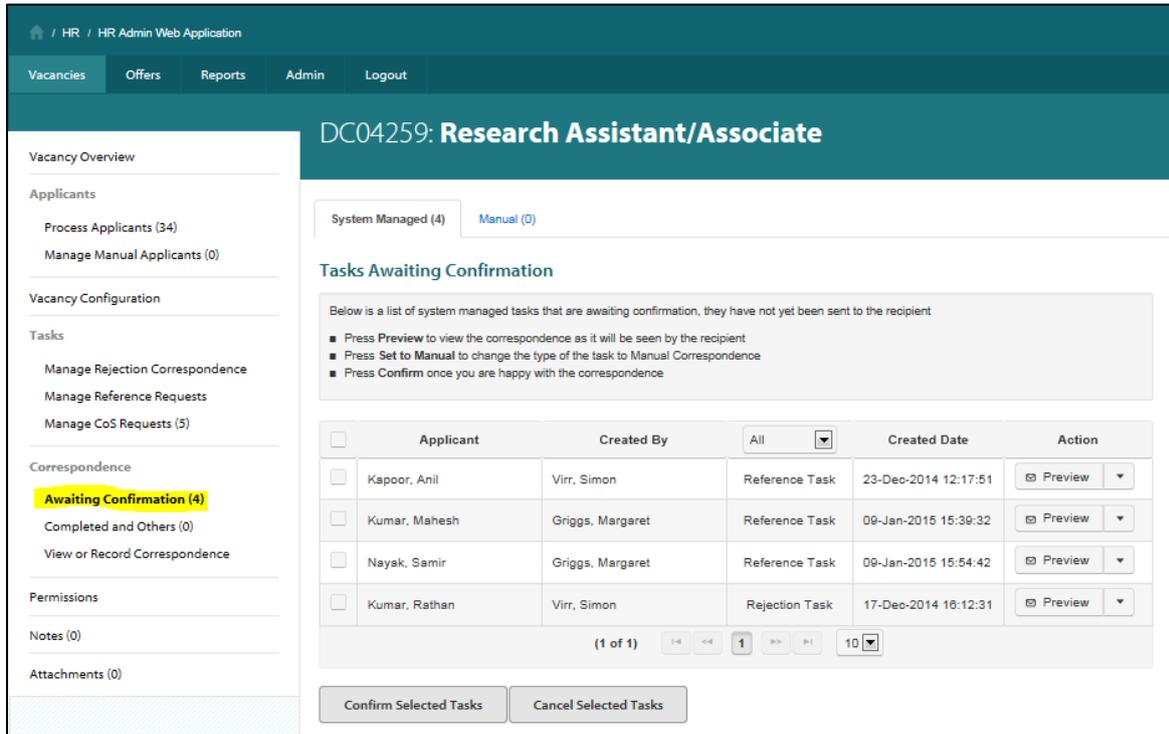
 **Information Saved**
The contact information has been saved

Contact Information Reference Correspondence

 **Information Saved** The contact information has been saved

Step 3 – Cancel the rejection tasks

From the **Correspondence Awaiting Confirmation** menu option on the left menu bar:



DC04259: **Research Assistant/Associate**

System Managed (4) Manual (0)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

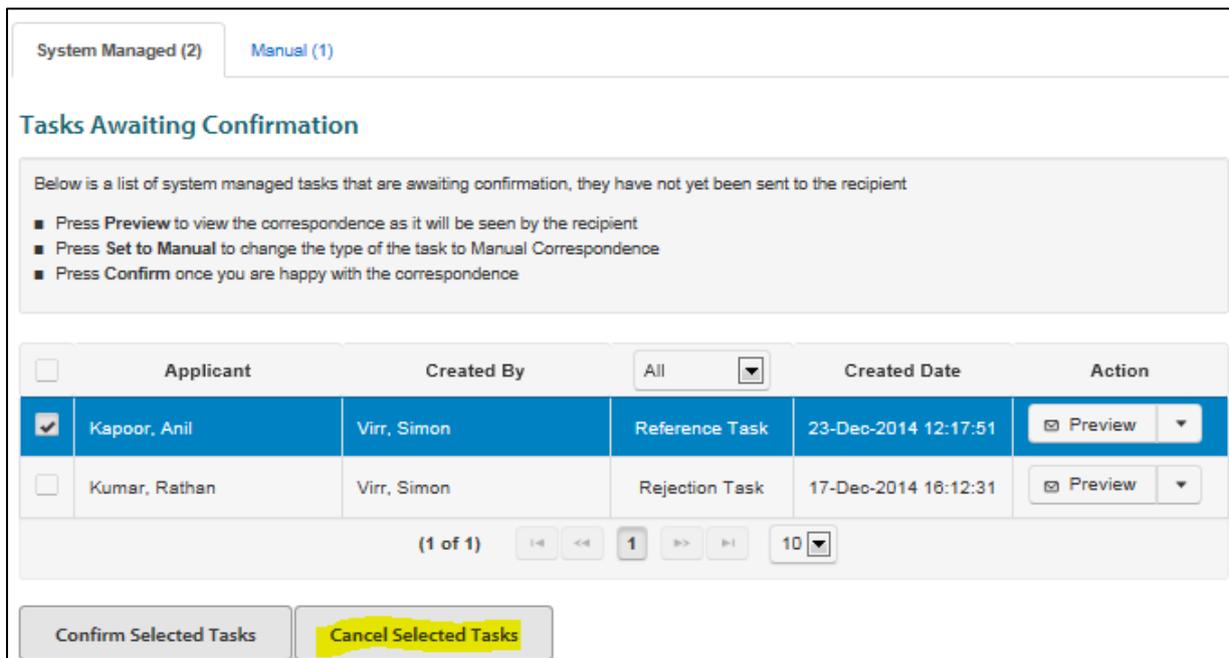
- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

<input type="checkbox"/>	Applicant	Created By	All	Created Date	Action
<input type="checkbox"/>	Kapoor, Anil	Virr, Simon	Reference Task	23-Dec-2014 12:17:51	Preview
<input type="checkbox"/>	Kumar, Mahesh	Griggs, Margaret	Reference Task	09-Jan-2015 15:39:32	Preview
<input type="checkbox"/>	Nayak, Samir	Griggs, Margaret	Reference Task	09-Jan-2015 15:54:42	Preview
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview

(1 of 1) 1 10

Confirm Selected Tasks Cancel Selected Tasks

Tick the task you wish to cancel and click on **Cancel Selected Tasks**.



System Managed (2) Manual (1)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

<input type="checkbox"/>	Applicant	Created By	All	Created Date	Action
<input checked="" type="checkbox"/>	Kapoor, Anil	Virr, Simon	Reference Task	23-Dec-2014 12:17:51	Preview
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview

(1 of 1) 1 10

Confirm Selected Tasks **Cancel Selected Tasks**

You will be asked to confirm the cancellation.

Confirm Cancellation

Are you sure you want to cancel the selected tasks ?

Note: For Rejection Tasks, the status of the associated candidates will remain as **Rejected**

When you refresh the screen the task will have been removed:

System Managed (1)
Manual (1)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

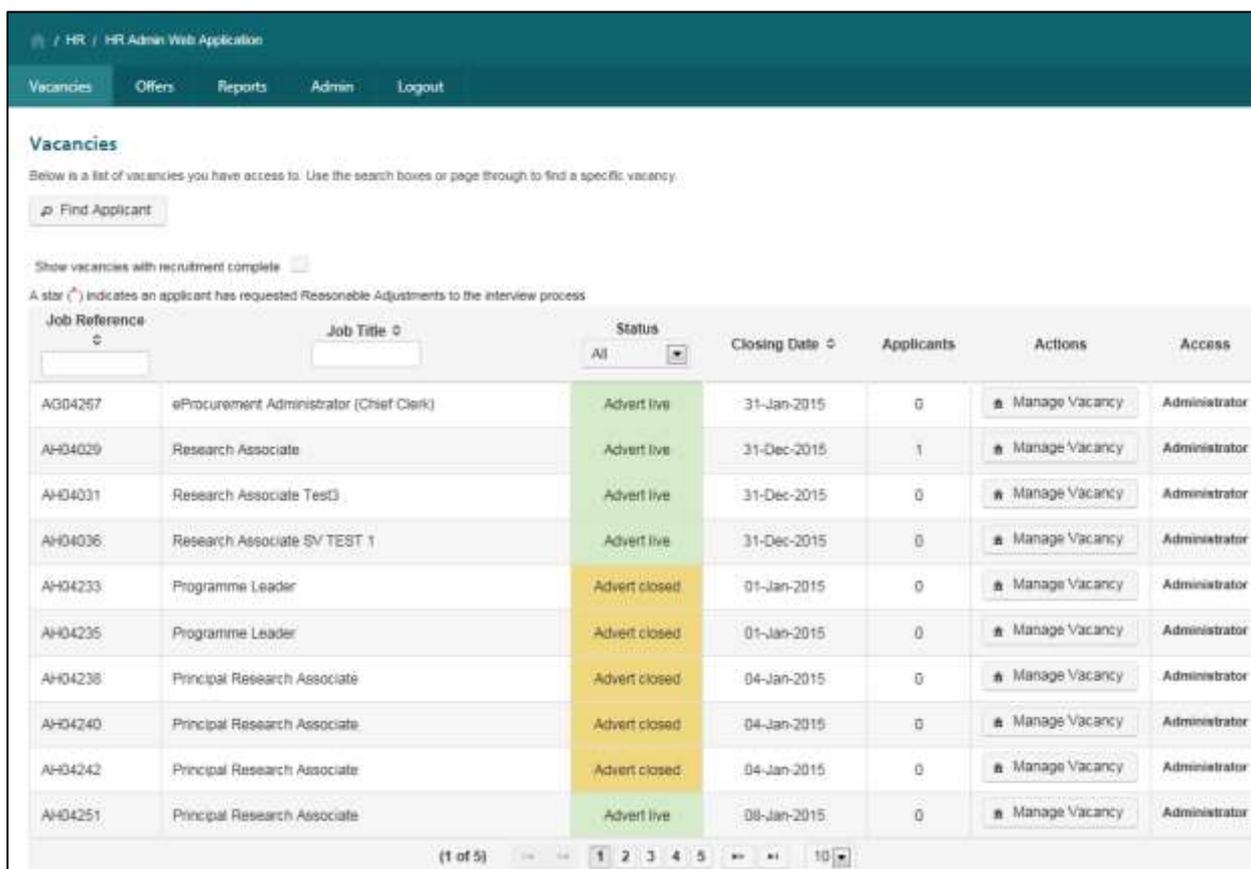
<input type="checkbox"/>	Applicant	Created By	All ▼	Created Date	Action
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview ▼

(1 of 1)
|<
<<
1
>>
|>
10 ▼

Step 4 – Record details of how the rejections were handled.

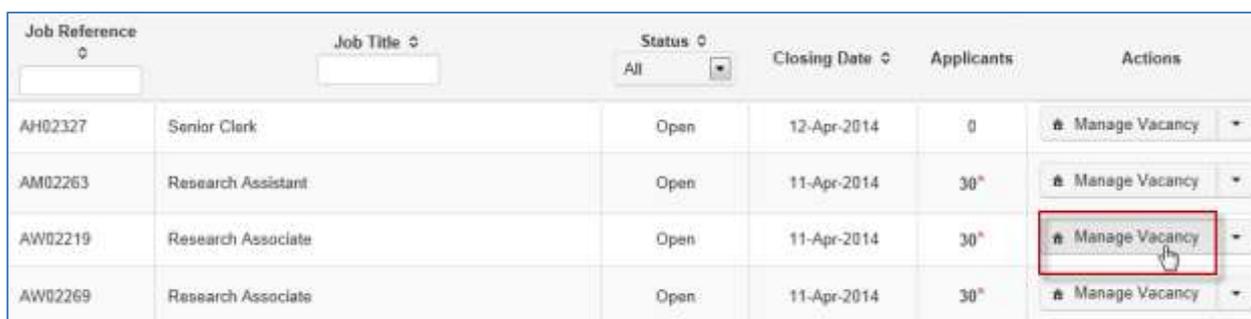
In order that you do not need to keep separate records outside of the system, it is recommended that you input details of the manual rejections sent (i.e. outside of the system) by using the **Recording correspondence** function within Web Recruitment.

From the vacancy tab:



Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AG04267	eProcurement Administrator (Chief Clerk)	Advert live	31-Jan-2015	0	Manage Vacancy	Administrator
AH04029	Research Associate	Advert live	31-Dec-2015	1	Manage Vacancy	Administrator
AH04031	Research Associate Test3	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04036	Research Associate SV TEST 1	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04233	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04235	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04238	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04240	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04242	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04251	Principal Research Associate	Advert live	08-Jan-2015	0	Manage Vacancy	Administrator

Locate the vacancy for which you wish to record details of the manual rejection correspondence. Click on the **Manage Vacancy** button.



Job Reference	Job Title	Status	Closing Date	Applicants	Actions
AH02327	Senior Clerk	Open	12-Apr-2014	0	Manage Vacancy
AM02263	Research Assistant	Open	11-Apr-2014	30*	Manage Vacancy
AW02219	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy
AW02269	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy

Select View or Record Correspondence from the Correspondence section on the left of the screen:

HR / HR Admin Web Application

Vacancies Offers Reports Admin Logout

DC04259: Research Assistant/Associate

Vacancy Overview

Applicants

- Process Applicants (34)
- Manage Manual Applicants (0)

Vacancy Configuration

Tasks

- Manage Rejection Correspondence
- Manage Reference Requests
- Manage CoS Requests (5)

Correspondence

- Awaiting Confirmation (2)
- Completed and Others (2)
- View or Record Correspondence**

Permissions

- Notes (0)
- Attachments (0)

View or Record Correspondence

The table below details all of the correspondence sent for this vacancy and details the following information:

- Type:** The reason for the correspondence, for example a reference request
- Format:** The format of the correspondence, for example email or phone call
- System Managed:** Was the correspondence automatically generated by the system

You will also be able to record a record of any correspondence that took place outside of the system using the 'Record Correspondence' button.

[Record Correspondence](#)

Date Sent	All Applicants	All Types	Format	System Managed	Action
No records found.					
(1 of 1) [Navigation icons]					

Select Record Correspondence.

View or Record Correspondence

The table below details all of the correspondence sent for this vacancy and details the following information:

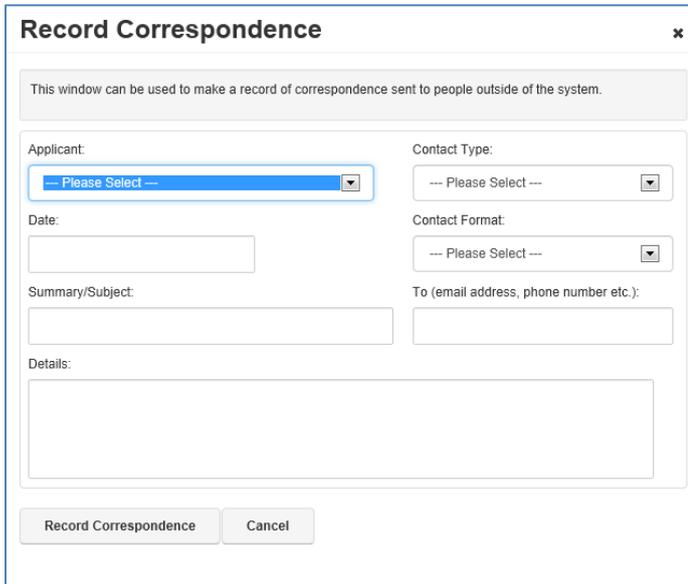
- Type:** The reason for the correspondence, for example a reference request
- Format:** The format of the correspondence, for example email or phone call
- System Managed:** Was the correspondence automatically generated by the system

You will also be able to record a record of any correspondence that took place outside of the system using the 'Record Correspondence' button.

Record Correspondence

Date Sent	All Applicants	All Types	Format	System Managed	Action
20-Mar-2014 11:29:32	Butcher, Jeremy	Reference	Email	Yes	View
20-Mar-2014 11:29:32	Collins, Gemma	Reference	Email	Yes	View

The **Record Correspondence** window will be displayed.



Record Correspondence [x]

This window can be used to make a record of correspondence sent to people outside of the system.

Applicant:

Contact Type:

Date:

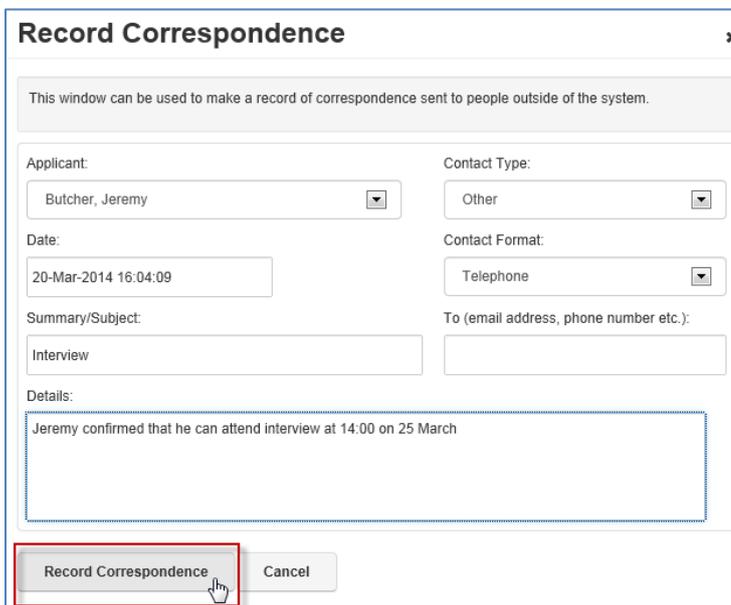
Contact Format:

Summary/Subject:

To (email address, phone number etc.):

Details:

Select the relevant applicant from the drop down list. Select the **Contact Type** and **Contact Format**; enter the **Date**, **Summary/Subject** and **Details**. Once complete, click on the **Record Correspondence** button.



Record Correspondence [x]

This window can be used to make a record of correspondence sent to people outside of the system.

Applicant:

Contact Type:

Date:

Contact Format:

Summary/Subject:

To (email address, phone number etc.):

Details:

The entry will appear in the table.

Date Sent	All Applicants	All Types	Format	System Managed	Action
20-Mar-2014 16:04:09	Butcher, Jeremy	Other	Telephone	No	<input type="button" value="View"/>

4. Using Electronic References within Web Recruitment

4.1 Generating electronic reference requests

Reference requests can be sent electronically at the required point in the process to referees for whom applicants have:

- Supplied an email address; and
- Indicated in their application form that they can be contacted at that time (applicants currently have the option to tell us that referees can be contacted during the selection process, or once they have been made an offer of employment).

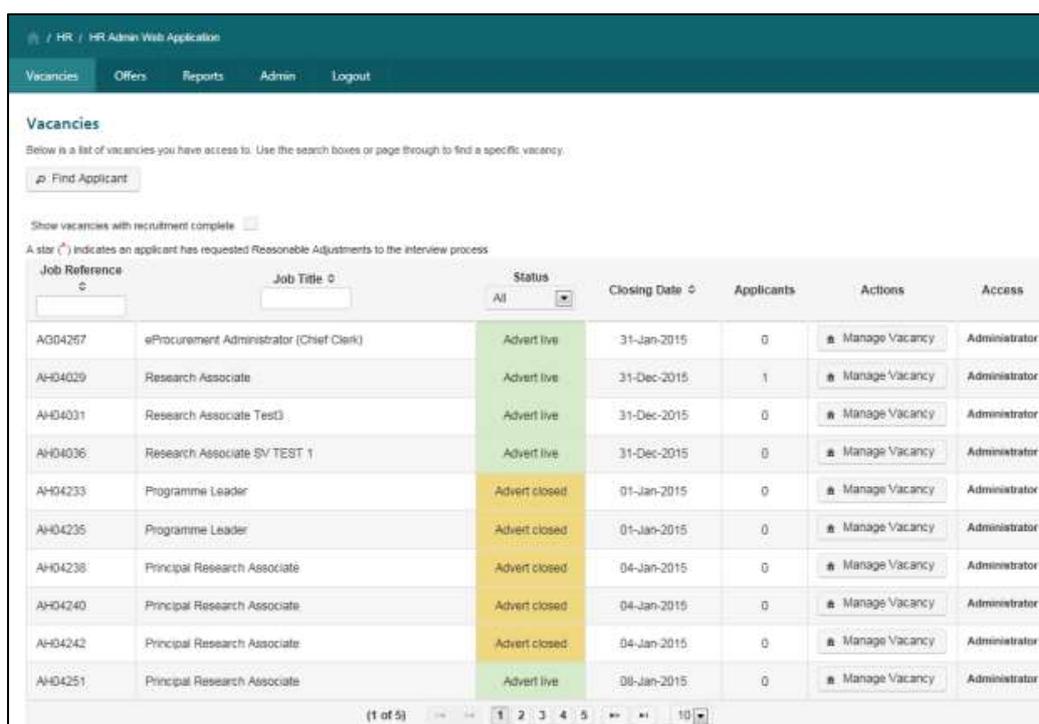
Further details about when to request references, when they may be used in the selection process, how to evaluate them and data protection implications of references can be found in the [Request references](#) section of the Recruitment Guidance.

Within the Web recruitment system the process consists of three steps:

- Step 1 – Set-up the contact and reference information for the vacancy
- Step 2 – Identify the applicant(s) and request the reference
- Step 3 – Confirm the reference request

Step 1 – Set-up the contact and reference information for the vacancy

1. Log in to the HR Admin Panel. The **Vacancies** Tab will display all the vacancies that you have access to.



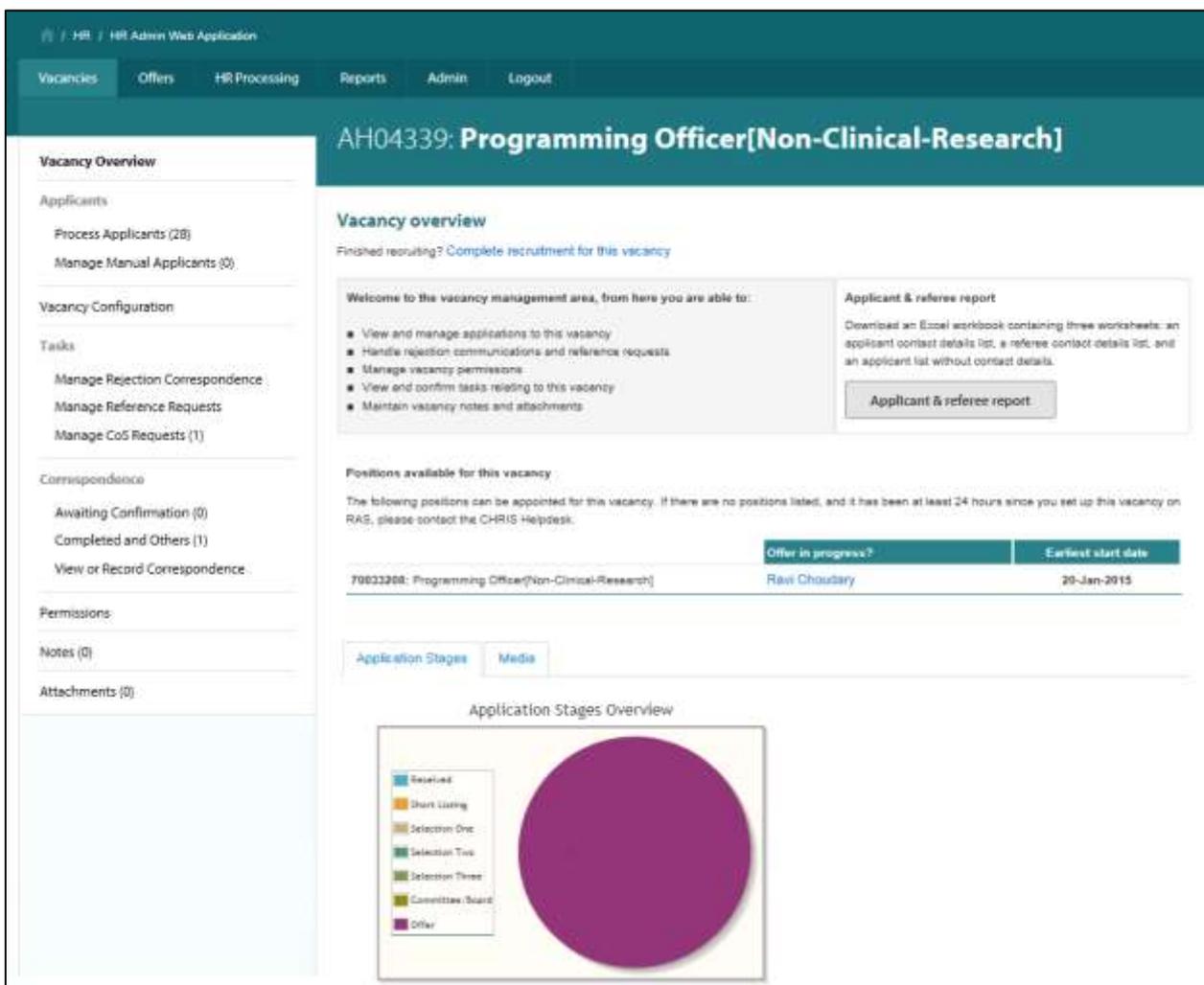
The screenshot shows the 'Vacancies' tab in the HR Admin Panel. It displays a list of vacancies with columns for Job Reference, Job Title, Status, Closing Date, Applicants, Actions, and Access. The table includes 11 rows of data, with some rows highlighted in green (Advert live) and others in yellow (Advert closed). A search bar and pagination controls are also visible.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AG04257	eProcurement Administrator (Chief Clerk)	Advert live	31-Jan-2015	0	Manage Vacancy	Administrator
AH04029	Research Associate	Advert live	31-Dec-2015	1	Manage Vacancy	Administrator
AH04031	Research Associate Test3	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04036	Research Associate SV TEST 1	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04233	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04235	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04238	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04240	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04242	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04251	Principal Research Associate	Advert live	08-Jan-2015	0	Manage Vacancy	Administrator

2. Locate the vacancy for which you wish to send out reference requests. Click on the **Manage Vacancy** button.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions
AH02327	Senior Clerk	Open	12-Apr-2014	0	Manage Vacancy
AM02263	Research Assistant	Open	11-Apr-2014	30*	Manage Vacancy
AW02219	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy
AW02269	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy

The **Vacancy Overview** screen will be displayed:



AH04339: Programming Officer[Non-Clinical-Research]

Vacancy overview

Finished recruiting? [Complete recruitment for this vacancy](#)

Welcome to the vacancy management area, from here you are able to:

- View and manage applications to this vacancy
- Handle rejection communications and reference requests
- Manage vacancy permissions
- View and confirm tasks relating to this vacancy
- Maintain vacancy notes and attachments

Applicant & referees report

Download an Excel workbook containing three worksheets: an applicant contact details list, a referee contact details list, and an applicant list without contact details.

[Applicant & referee report](#)

Positions available for this vacancy

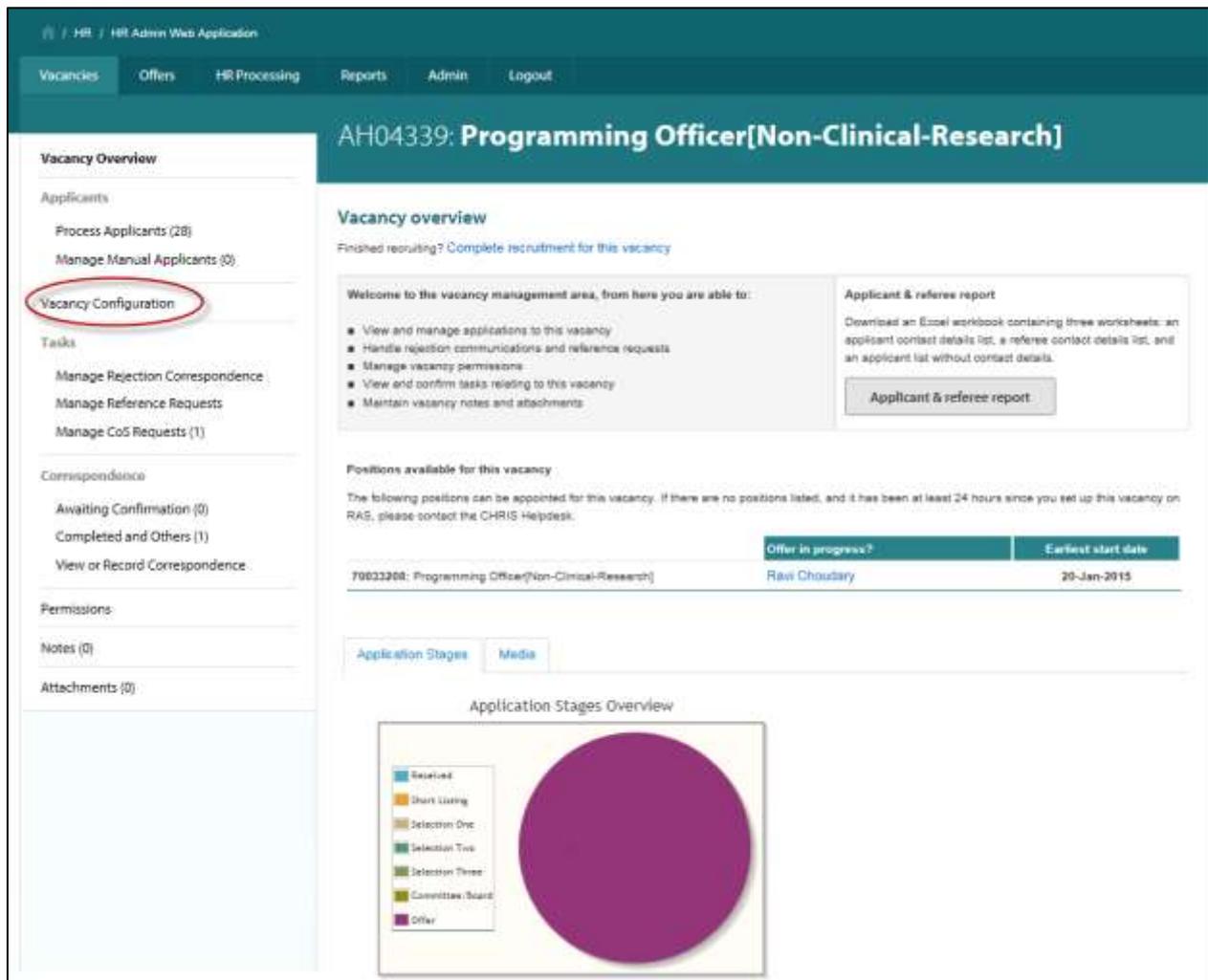
The following positions can be appointed for this vacancy. If there are no positions listed, and it has been at least 24 hours since you set up this vacancy on RAS, please contact the CHRIS Helpdesk.

	Offer in progress?	Earliest start date
70632268: Programming Officer[Non-Clinical-Research]	Ravi Choudhary	20-Jan-2015

Application Stages Overview

Application Stages: Rejected, Short Listing, Selection One, Selection Two, Selection Three, Committee/Board, Offer.

3. Select **Vacancy Configuration**.



The screenshot displays the 'HR Admin Web Application' interface. The top navigation bar includes 'Vacancies', 'Offers', 'HR Processing', 'Reports', 'Admin', and 'Logout'. The main header shows the current vacancy: 'AH04339: Programming Officer[Non-Clinical-Research]'. On the left-hand side, a navigation menu lists various options, with 'Vacancy Configuration' circled in red. The main content area shows a 'Vacancy overview' section with a list of tasks, a table of positions available, and an 'Application Stages Overview' pie chart.

Vacancy Overview

Applicants

- Process Applicants (28)
- Manage Manual Applicants (0)
- Vacancy Configuration**

Tasks

- Manage Rejection Correspondence
- Manage Reference Requests
- Manage CoS Requests (1)

Correspondence

- Awaiting Confirmation (0)
- Completed and Others (1)
- View or Record Correspondence

Permissions

- Notes (0)
- Attachments (0)

Vacancy overview

Finished recruiting? Complete recruitment for this vacancy

Welcome to the vacancy management area, from here you are able to:

- View and manage applications to this vacancy
- Handle rejection communications and reference requests
- Manage vacancy permissions
- View and confirm tasks relating to this vacancy
- Maintain vacancy notes and attachments

Applicant & referee report

Download an Excel workbook containing three worksheets: an applicant contact details list, a referee contact details list, and an applicant list without contact details.

Applicant & referee report

Positions available for this vacancy

The following positions can be appointed for this vacancy. If there are no positions listed, and it has been at least 24 hours since you set up this vacancy on RAS, please contact the CHRIS Helpdesk.

	Offer in progress?	Earliest start date
70823268: Programming Officer[Non-Clinical-Research]	Ravi Choudary	20-Jan-2015

Application Stages | Media

Application Stages Overview

- Received
- Short Listing
- Selection One
- Selection Two
- Selection Three
- Committee Board
- Offer

4. If you have not done so already, enter the contact information for the vacancy. If you are an administrator sending letters on behalf of a colleague then you may enter another person’s details into these fields.

General Configuration
All Correspondence
Reference Correspondence
Retention Policy

Configure Contact Information

Contact information is applicable to all correspondence. Details entered here will be included as the contact details for rejection and reference requests emails as well as the from fields of generated letters.

Your title *

Contact email address: *

Contact name: *

Address: *

Contact job title: *

Mark Contact Configuration as complete?

Contact phone number: *

Please note that if you update the contact information at any point, all correspondence that you have already generated, and which is awaiting confirmation, will be updated with the amended details. If you do not wish this to happen, you can confirm awaiting confirmation tasks before making a change to the contact information

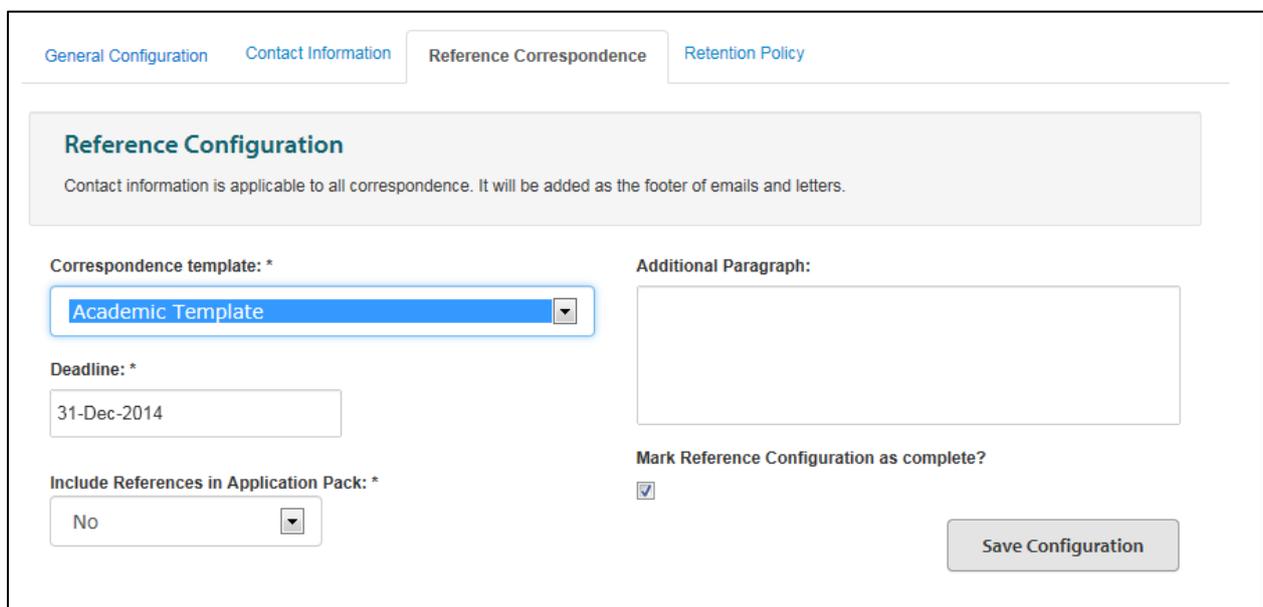
- Once the Contact Information is complete, ensure that you check the **Mark Contact Configuration as complete** check box and click on **Save Configuration**.

Mark Contact Configuration as complete?

6. Select the second tab in this window, **Reference Correspondence**



Select the reference request template that you wish to use.



Three templates have been developed:

- An academic template to assess an individual’s academic standing and potential, paying particular attention to his/her performance in teaching and research.
- A non-academic template for a general assessment of the individual’s suitability for the role.
- A non-academic form that is similar to the old PD15 form (i.e. a structured template for the referee’s assessment, which asks specific questions about generic skills, whether they would re-employ the individual etc.).

7. Enter the preferred date by which you would like referees to have responded to your request.

Deadline: *

⌚
Apr ▾ 2014 ▾
⌚

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Today
Done

8. If required, use the **Additional Paragraph** field to enter an additional paragraph of text that you would like included in the letter for all reference requests for the vacancy.

Reference Configuration

Contact information is applicable to all correspondence. It will be added as the footer of emails and letters.

Correspondence template: *

Non-academic Template With Form ▾

Deadline: *

30-Apr-2014

Include References in Application Pack: *

No ▾

Additional Paragraph:

Mark Reference Configuration as complete?

The additional text will be included only in the reference mail

Save Configuration

The additional paragraph will appear in the position shown in the example below:

Dear Dr Smith,

Reference Request for Mrs Denise Cooper

Mrs Denise Cooper has applied to the University for the position of Personal Assistant to Departmental Secretary and has given your name as someone whom we can approach for a reference.

I should be very grateful for your assessment of the suitability of the candidate for this appointment. I have enclosed details of the position to assist you.

Please advise on suitability based upon further particulars

It would be particularly helpful if you were able to provide your reference by 31 July 2014 and if you would confirm how the candidate is known to you. If they are known to you as an employee, it would be appreciated if you would also provide a brief outline of the position they held, and the dates of their employment and details of any disciplinary record within the last 12 months of employment.

Please be aware that under the Data Protection Act 1998, applicants would normally have access to the information provided by their referees if they request it from us. This is because an organisation providing a reference is exempt under the Data Protection Act but the organisation receiving the reference is not. If there are strong reasons for protecting the confidentiality of your reference, please state them within your reply. For your information, the law relating to data protection and references is explained at www.ico.gov.uk.

Thank you in advance for your assistance in this matter.

Yours sincerely,

9. Once you have finished configuring contact information, click on the check box to **Mark Reference Correspondence as complete** and click the **Save Configuration** button.



Note: You also have the option on this screen to decide whether the returned references ought to be included in the application pack for members of the Appointing Body to review. The default is not to include them. Please see the [Request references](#) section of the Recruitment Guidance for information on when and when not to use references as part of the selection process.

Step 2 – Identify the applicant(s) and request the reference

Select **Manage Reference Request** from the Tasks section of the navigation menu.

HR / HR Admin Web Application
Vacancies Offers Reports Admin Logout

DC04259: Research Assistant/Associate

Vacancy Overview

Applicants

- Process Applicants (34)
- Manage Manual Applicants (0)

Vacancy Configuration

Tasks

- Manage Rejection Correspondence
- Manage Reference Requests
- Manage CoS Requests (5)

Correspondence

- Awaiting Confirmation (3)
- Completed and Others (0)
- View or Record Correspondence

Permissions

Notes (0)

Attachments (0)

Request References

From this section you will be able to request references automatically from referees who were supplied with an email address and for applicants who have given their consent for a referee to be contacted at this stage.

Select a stage to begin requesting references:

	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>	<input type="text"/>				▼	
<input type="checkbox"/>	Gpoi, Vamshi	Mr Ella Ackley	+ Add Reference ▼	Email	Not Started	
<input type="checkbox"/>	Gpoi, Vamshi	Not Contactable	+ Add Reference ▼		Not Contactable	
<input type="checkbox"/>	Kapoor, Anil	Mr Amelia Abner	+ Add Reference ▼	Email	Awaiting Confirmation	
<input type="checkbox"/>	Kapoor, Anil	Not Contactable	+ Add Reference ▼		Not Contactable	
<input type="checkbox"/>	Karamkanty, Ajay	Mr Abby Abbey	+ Add Reference ▼	Email	Not Started	
<input type="checkbox"/>	Karamkanty, Ajay	Not Contactable	+ Add Reference ▼		Not Contactable	
<input type="checkbox"/>	Kumar, Mahesh	Mr Daisy Ackerman	+ Add Reference ▼	Email	Awaiting Confirmation	
<input type="checkbox"/>	Kumar, Mahesh	Not Contactable	+ Add Reference ▼		Not Contactable	
<input type="checkbox"/>	Nayak, Samir	Mr Emily Acock	+ Add Reference ▼	Email	Not Started	
<input type="checkbox"/>	Nayak, Samir	Not Contactable	+ Add Reference ▼		Not Contactable	

(1 of 5)
◀ ◁ ▷ ▶
1 2 3 4 5
▶▶ ▶
10 ▼

Request References

Select the stage of the process that you are currently working in from the drop down box.

Request References

From this section you will be able to request referees to be contacted. You will be able to request referees to be contacted. You will be able to request referees to be contacted.

Select a stage to begin requesting references

Stage: -- Please Select --

- Please Select --
- Received
- Short Listing
- Selection One**
- Selection Two
- Selection Three
- Committee/Board
- Offer

No Referees to view, use the filter above to search

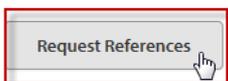
The applicants at this stage and their referees will be displayed. Where the applicant has indicated on the application form that they do not wish the referee to be contacted before they have been made an offer, the referee will be displayed in grey and shown as not contactable until the applicant is recorded in the system as having accepted an offer.

<input type="checkbox"/>	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>	Butcher, Jeremy	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Butcher, Jeremy	Dr Test2 Test2	+ Upload	Email	Not Started	
<input type="checkbox"/>	Collins, Gemma	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Collins, Gemma	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Croxford, Carl	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Croxford, Carl	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Curtis, James	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Curtis, James	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Davies, Edward	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Davies, Edward	Dr Test2 Test2	+ Upload	Email	Not Started	

Select the applicants for whom you wish to send a reference request and click on **Request References**.

<input checked="" type="checkbox"/>	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>						
<input type="checkbox"/>	Butcher, Jeremy	Not Contactable	+ Upload		Not Contactable	
<input checked="" type="checkbox"/>	Butcher, Jeremy	Dr Test2 Test2	+ Upload	Email	Not Started	
<input checked="" type="checkbox"/>	Collins, Gemma	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Collins, Gemma	Not Contactable	+ Upload		Not Contactable	
<input checked="" type="checkbox"/>	Croxford, Carl	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Croxford, Carl	Not Contactable	+ Upload		Not Contactable	
<input checked="" type="checkbox"/>	Curtis, James	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Curtis, James	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Davies, Edward	Not Contactable	+ Upload		Not Contactable	
<input checked="" type="checkbox"/>	Davies, Edward	Dr Test2 Test2	+ Upload	Email	Not Started	

(1 of 1) 1 10

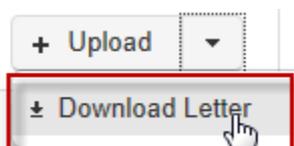


A confirmation message will be displayed and Awaiting Confirmation will be displayed in the status column for the referees that have been selected. See Step 3 below for instructions on what to do next to confirm that the reference request emails should be sent.

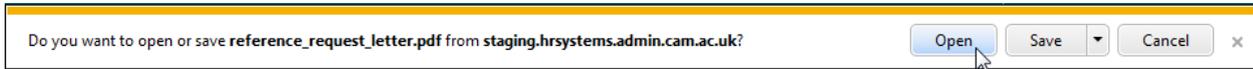
<input type="checkbox"/>	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>						
<input type="checkbox"/>	Butcher, Jeremy	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Butcher, Jeremy	Dr Test2 Test2	+ Upload	Email	Awaiting Confirmation	
<input type="checkbox"/>	Collins, Gemma	Mr Test1 Test1	+ Upload	Email	Awaiting Confirmation	

Reference Requests Generated
Reference requests have been generated are awaiting confirmation

Note that if you need to send a reference request outside the system (for example because a referee has been supplied without an email address) click on the drop-down menu next to the Upload button and Click **Download Letter**. This will open a PDF that you can print and post.



Select **Open** in the pop-up window.

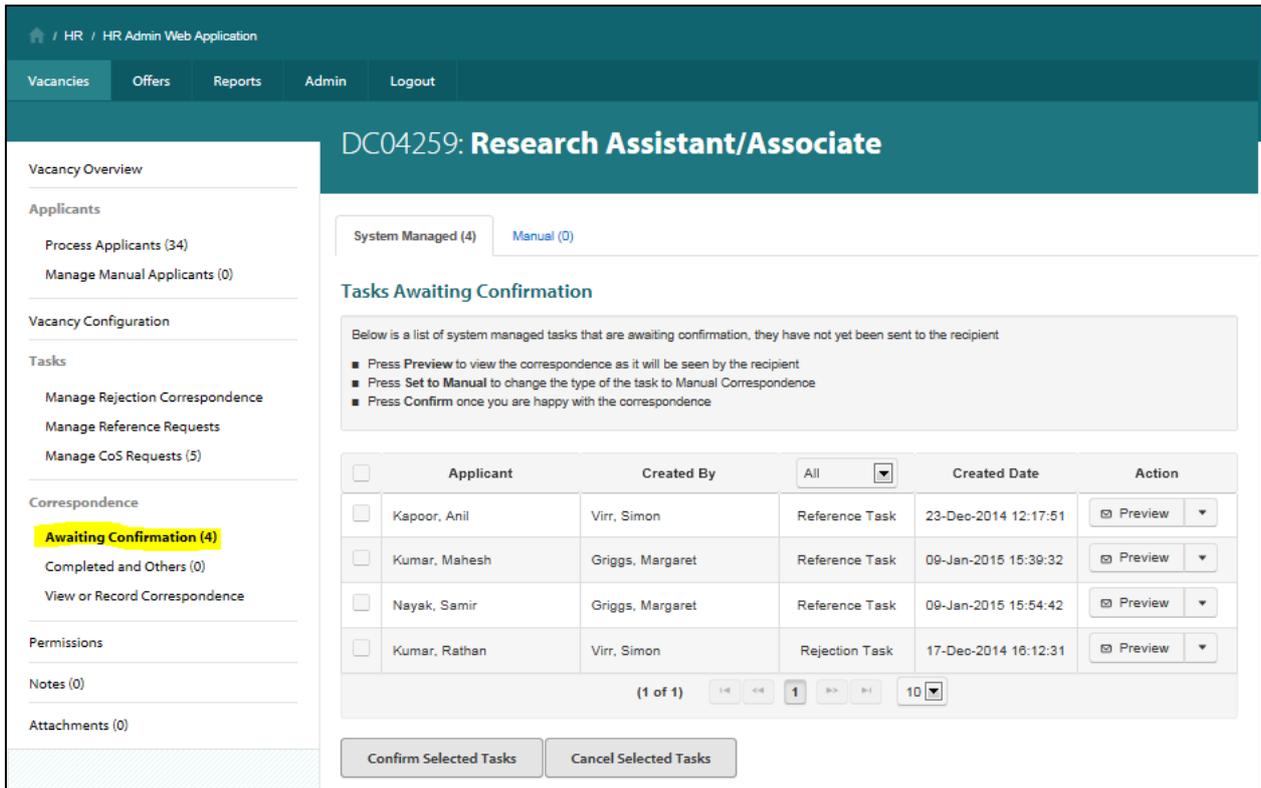


A PDF will open that you can post as appropriate.



Step 3 – Confirm the reference request

For reference request emails, you now need to navigate to **Correspondence** in the toolbar at the left-hand side of the screen and select **Awaiting Confirmation**.



DC04259: Research Assistant/Associate

System Managed (4) Manual (0)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

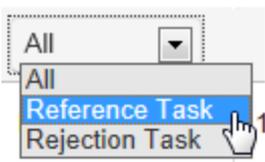
- Press Preview to view the correspondence as it will be seen by the recipient
- Press Set to Manual to change the type of the task to Manual Correspondence
- Press Confirm once you are happy with the correspondence

<input type="checkbox"/>	Applicant	Created By	All	Created Date	Action
<input type="checkbox"/>	Kapoor, Anil	Virr, Simon	Reference Task	23-Dec-2014 12:17:51	Preview
<input type="checkbox"/>	Kumar, Mahesh	Griggs, Margaret	Reference Task	09-Jan-2015 15:39:32	Preview
<input type="checkbox"/>	Nayak, Samir	Griggs, Margaret	Reference Task	09-Jan-2015 15:54:42	Preview
<input type="checkbox"/>	Kumar, Rathen	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview

(1 of 1) 10

Confirm Selected Tasks Cancel Selected Tasks

Use the Filter to sort Reference Tasks from Rejection Tasks



Select **Preview** button in the Action column to view a copy of a reference request.

<input type="checkbox"/>	Applicant	Created By	Reference	Created Date	Action
<input type="checkbox"/>	Butcher, Jeremy	Peacock, Sally	Reference Task	20-Mar-2014 10:43:34	Preview

A preview will be displayed:

Correspondence Preview

Task Details

- Status: Awaiting Confirmation
- Created Date: 20-Mar-2014 10:43:34

Correspondence Details:

- To: sharath.konda@admin.cam.ac.uk
- Subject: Confidential: University of Cambridge - Request For Reference

PRIVATE AND CONFIDENTIAL

Dear Dr Test2

Reference Request for Mr Jeremy Butcher

Mr Jeremy Butcher has applied to the University for the position of Research Associate and has given your name as someone whom we can approach for a reference.

I should be very grateful if you would complete the reference form available for you to download [here](#). Once completed please upload the form using the link below and authenticate using the PIN: 58903. It would be particularly helpful if you would upload your reference form by 30 April 2014.

<http://staging.hrssystem.admin.cam.ac.uk/recruit-ui/pages/auth/referee-login.xhtml?accessCode=18bf7571-4237-4e84-bd4b-b720009b1080>

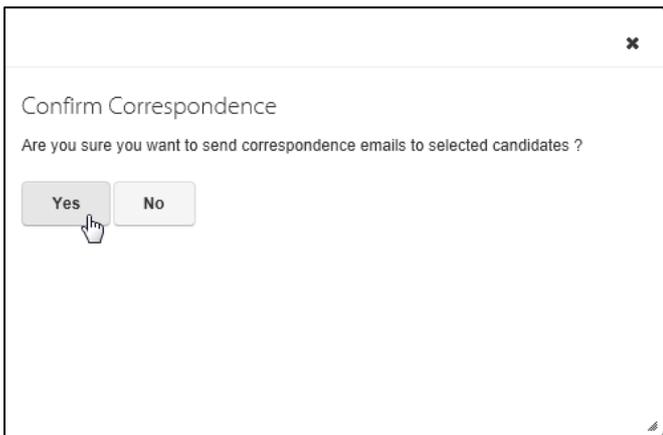
Before completing the enclosed Reference Request Form, please read the note on

When you are satisfied with the correspondence generated, select the applicants for whom you wish to email reference requests and click the **Confirm Selected Tasks** button.

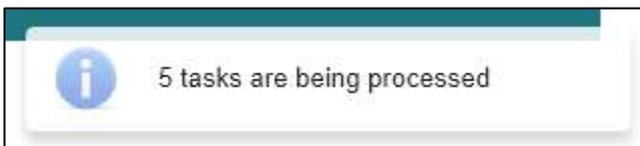
<input checked="" type="checkbox"/>	Applicant	Created By	Reference <input type="text" value="Reference"/>	Created Date	Action
<input checked="" type="checkbox"/>	Butcher, Jeremy	Peacock, Sally	Reference Task	20-Mar-2014 10:43:34	Preview <input type="text" value=""/>
<input checked="" type="checkbox"/>	Collins, Gemma	Peacock, Sally	Reference Task	20-Mar-2014 10:43:34	Preview <input type="text" value=""/>
<input checked="" type="checkbox"/>	Croxford, Carl	Peacock, Sally	Reference Task	20-Mar-2014 10:43:34	Preview <input type="text" value=""/>
<input checked="" type="checkbox"/>	Curtis, James	Peacock, Sally	Reference Task	20-Mar-2014 10:43:34	Preview <input type="text" value=""/>
<input checked="" type="checkbox"/>	Davies, Edward	Peacock, Sally	Reference Task	20-Mar-2014 10:43:34	Preview <input type="text" value=""/>

(1 of 1) 10

Confirm the correspondence by clicking on the **Yes** button in the pop-up window.



A tasks being processed message will be displayed. A reference request will be emailed to each referee.



Note that you can also cancel the reference request in this screen:

System Managed (2)
Manual (1)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

<input type="checkbox"/>	Applicant	Created By	All ▼	Created Date	Action
<input checked="" type="checkbox"/>	Kapoor, Anil	Virr, Simon	Reference Task	23-Dec-2014 12:17:51	Preview ▼
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview ▼

(1 of 1)
◀
◀◀
1
▶▶
▶
10 ▼

Confirm Selected Tasks
Cancel Selected Tasks

Tick the task you wish to cancel and click on **Cancel Selected Tasks**. You will be asked to confirm:

Confirm Cancellation

Are you sure you want to cancel the selected tasks ?

Note: For Rejection Tasks, the status of the associated candidates will remain as Rejected

Yes
No

When you refresh the screen the task will have been removed:

System Managed (1)
Manual (1)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

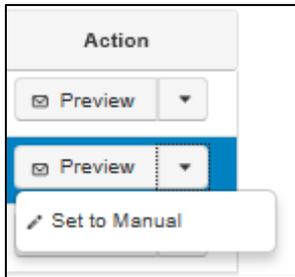
- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

<input type="checkbox"/>	Applicant	Created By	All ▼	Created Date	Action
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview ▼

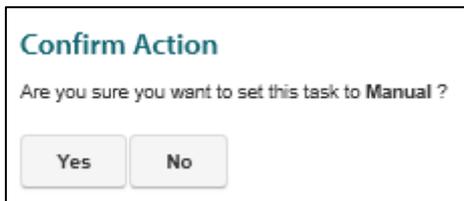
(1 of 1)
◀
◀◀
1
▶▶
▶
10 ▼

Confirm Selected Tasks
Cancel Selected Tasks

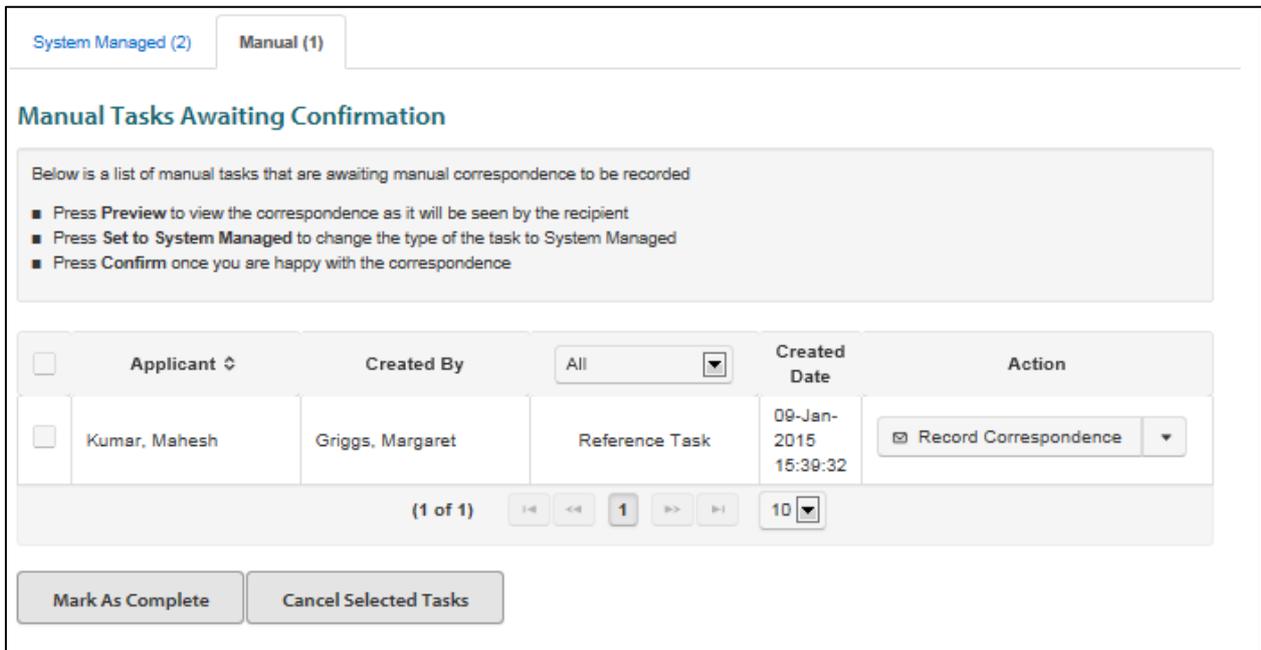
Note that you can also switch a reference back to manual on this screen by using the actions menu:



You will be asked to confirm the action:



When you refresh the screen the task will be shown under the **Manual** tab so that you can record the manual correspondence that you have sent or have decided to send.



4.2 Overview of the Electronic Process for Referees

Referees are emailed and provided with a link and a PIN to upload their reference into the Web Recruitment System.

The wording of the email is tailored [depending on whether you have added any customised content and the reference template you have selected](#). For example, the Academic template contains the following paragraph:

I should be very grateful for your evaluation of the suitability of the candidate for this appointment and your assessment of their academic standing and potential, paying particular attention to their performance in teaching and research. To upload your reference, and to see more information about the vacancy in question please visit the link below and authenticate using the PIN: **62311**

<http://localhost:8080/recruit-ui/pages/auth/referee-login.xhtml?accessCode=840309a8-c059-488a-b886-ddcde2938af5>

The non-academic template contains this paragraph:

I should be very grateful for your assessment of the suitability of the candidate for this appointment. To upload your reference, and to see more information about the vacancy in question please visit the link below and authenticate using the PIN: **75310**

<http://localhost:8080/recruit-ui/pages/auth/referee-login.xhtml?accessCode=a13ee21e-2cd3-4738-a17f-d2bdd1e9a08e>

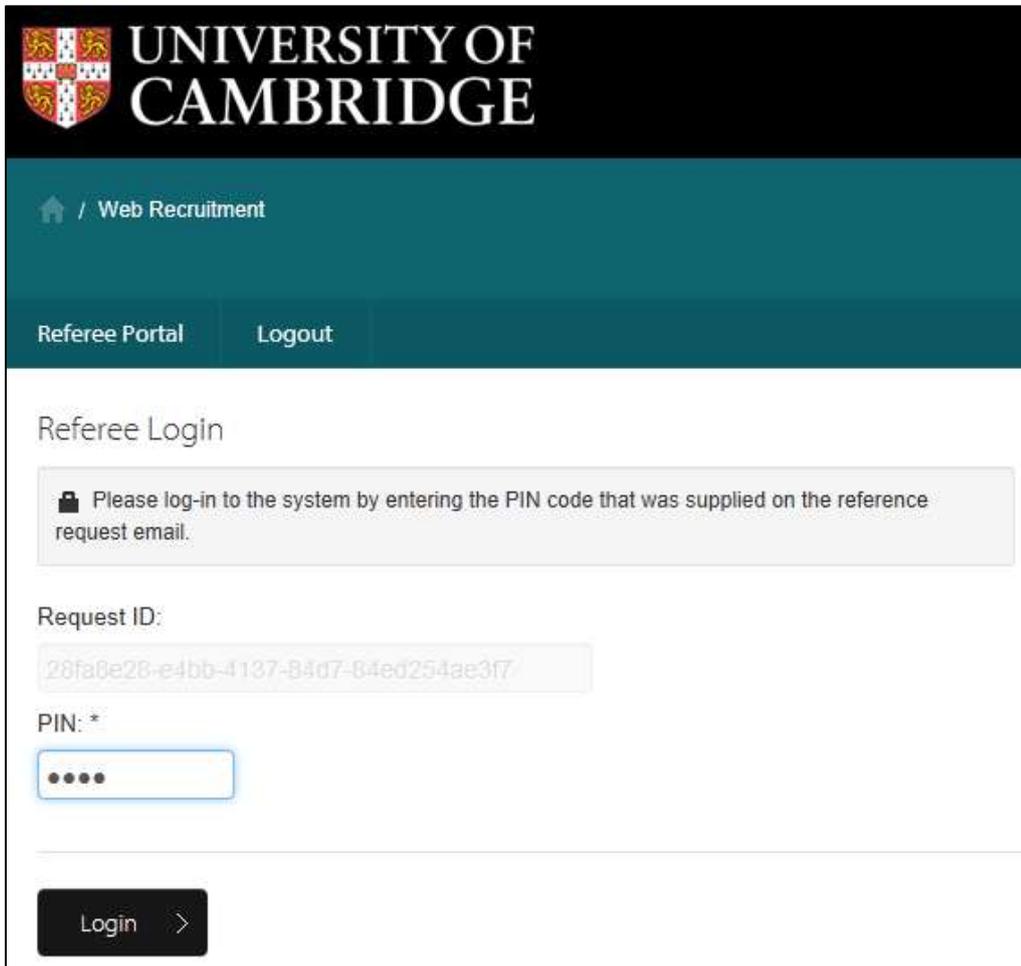
(Non Academic Template Example)

It would be particularly helpful if you were able to provide your reference by 28 March 2014 and if you would confirm how the candidate is known to you. If they are known to you as an employee, it would be appreciated if you would also provide a brief outline of the position they held, and the dates of their employment and details of any disciplinary record within the last 12 months' of employment.

The non-academic with form contains a link to be able to download the form:

I should be very grateful if you would complete the reference form available for you to download [here](#). Once completed, please upload the form using the link below and authenticate using the PIN: **68122**. It would be particularly helpful if you would upload your reference form by 28 March 2014.

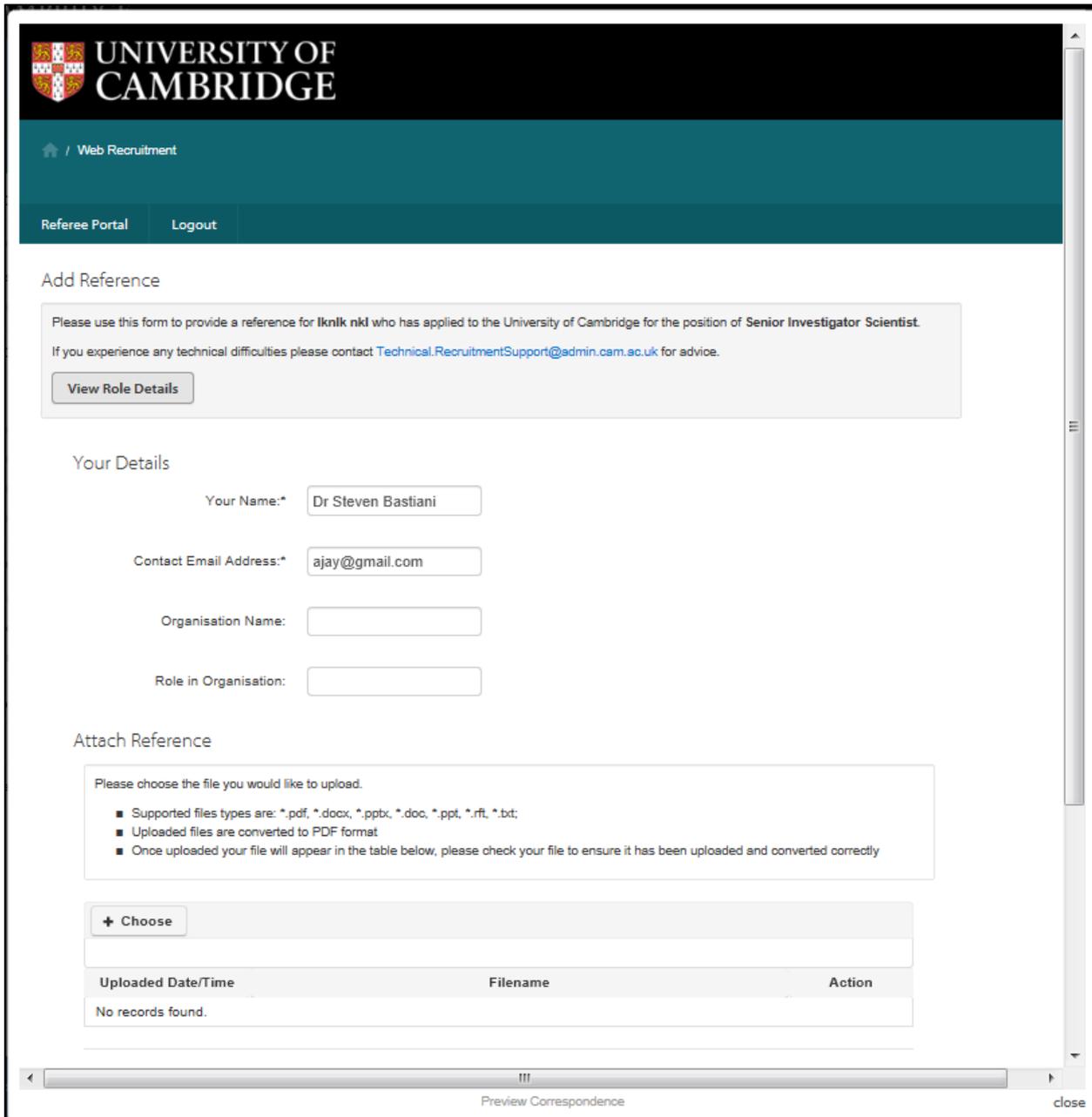
When the referee clicks on the link they will be required to enter the PIN and log in.



The screenshot shows the 'Referee Login' page of the University of Cambridge's CHRIS system. At the top left is the University of Cambridge crest and name. Below this is a teal navigation bar with a home icon and the text 'Web Recruitment'. Underneath are two buttons: 'Referee Portal' and 'Logout'. The main content area is titled 'Referee Login' and contains a message: 'Please log-in to the system by entering the PIN code that was supplied on the reference request email.' Below this message is a 'Request ID:' label followed by a text input field containing the alphanumeric string '28fa8e28-e4bb-4137-84d7-84ed254ae3f7'. Underneath is a 'PIN: *' label followed by a password input field with four dots. At the bottom left is a dark 'Login >' button.

By clicking on this link, they will also be able to view the Job Opportunities advert for the vacancy an individual is applying for, as well as any HR7 Further Information document published with the advert.

The referee will supply their organisation name and their role in the organisation and can then view the role details (advert and further information) and attach their reference.



UNIVERSITY OF CAMBRIDGE

Home / Web Recruitment

Referee Portal Logout

Add Reference

Please use this form to provide a reference for **Iknlk nkl** who has applied to the University of Cambridge for the position of **Senior Investigator Scientist**.
 If you experience any technical difficulties please contact Technical.RecruitmentSupport@admin.cam.ac.uk for advice.

[View Role Details](#)

Your Details

Your Name:*

Contact Email Address:*

Organisation Name:

Role in Organisation:

Attach Reference

Please choose the file you would like to upload.

- Supported files types are: *.pdf, *.docx, *.ppbx, *.doc, *.ppt, *.rft, *.txt;
- Uploaded files are converted to PDF format
- Once uploaded your file will appear in the table below, please check your file to ensure it has been uploaded and converted correctly

[+ Choose](#)

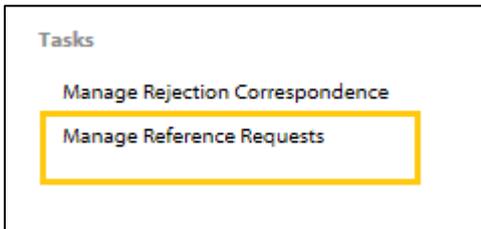
Uploaded Date/Time	Filename	Action
No records found.		

Preview Correspondence close

Where the non-academic with form has been selected as the reference template, then the referee will complete a reference form as below:

4.3 Viewing Returned References

- Once the reference has been received in the system, you will see this by selecting **Manage Reference Requests** under Tasks.



The status of all requests will be displayed in the table.

03169: Senior Investigator Scientist

Request References

From this section you will be able to request references automatically from referees who were supplied with an email address and for applicants who have given their consent for a referee to be contacted at this stage.

Select a stage to begin requesting references

Stage: Selection One

<input type="checkbox"/>	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>	nkl, lknik	Dr Steven Bastiani	+ Add Reference	Email	Complete	
<input type="checkbox"/>	nkl, lknik	Miss Ram Lakshman	+ Add Reference	Email	Not Started	

(1 of 1) 10

Request References

When a reference has been submitted, the status will display Complete and a PDF file will be shown in the File column. You can then download a copy of the reference.

<input type="checkbox"/>	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>	Butcher, Jeremy	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Butcher, Jeremy	Dr Test2 Test2	+ Upload	Email	Complete	
<input type="checkbox"/>	Collins, Gemma	Mr Test1 Test1	+ Upload	Email	Request Sent	

6. Requesting references manually

Reference requests do not have to be sent electronically using the Web Recruitment System.

If you do choose to collect these outside of the system then, in order to allow a complete audit trail and to avoid the need for you to keep manual records outside of the system, Web Recruitment will allow you record details of any manual reference requests and will also allow you to upload returned references. You are strongly encouraged to use this facility.

Further details about when to request references, when they may be used in the selection process, how to evaluate them and data protection implications of references can be found in the [Requesting references](#) section of the Recruitment Guidance.

Within the Web recruitment system the process consists of the following five steps:

Step 1 – Set up the contact and reference information for the vacancy

Step 2 – Identify the applicant(s) and initiate a reference record

Step 3 – Switch the correspondence task to manual

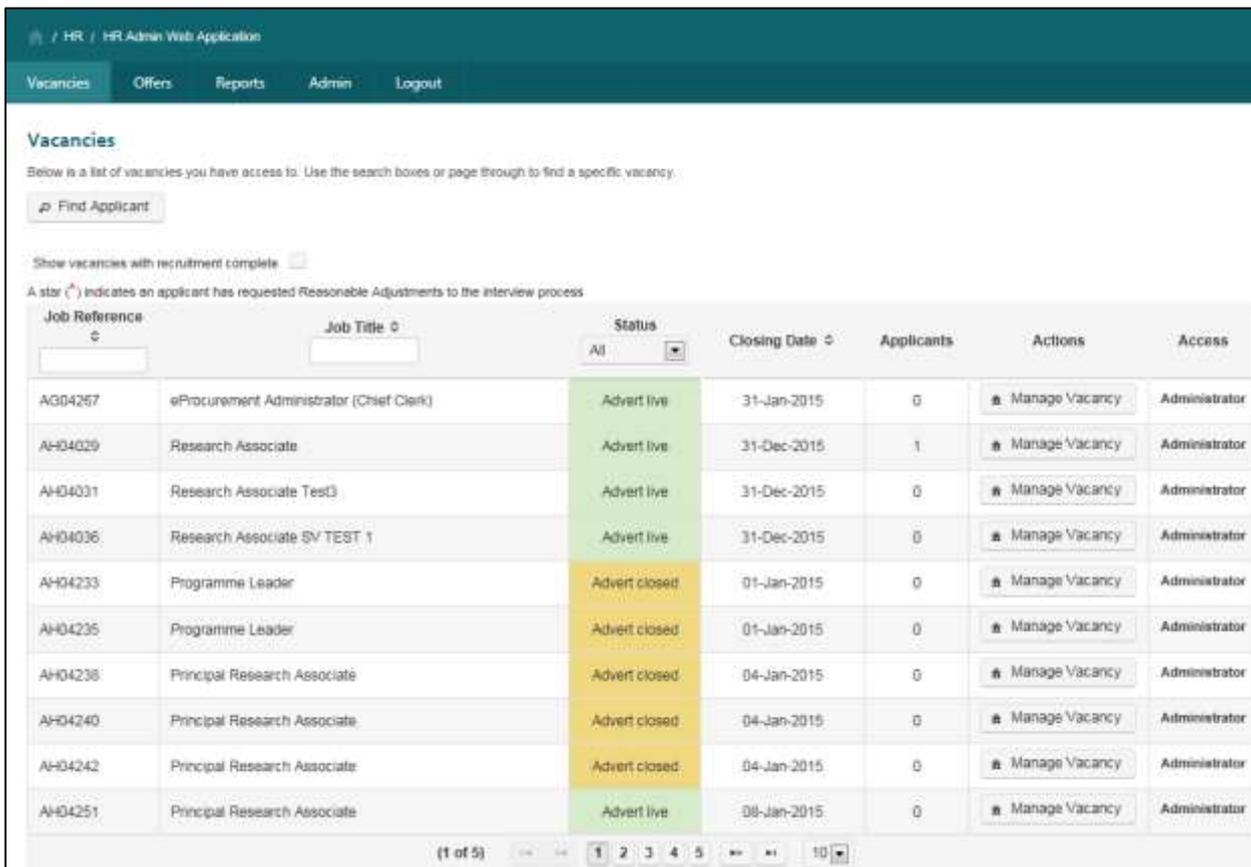
Step 4 - Record details of the correspondence sent to the applicant

Step 5 – Upload the returned reference

The sections below explain each step in detail.

Step 1 – Set-up the contact and reference information for the vacancy

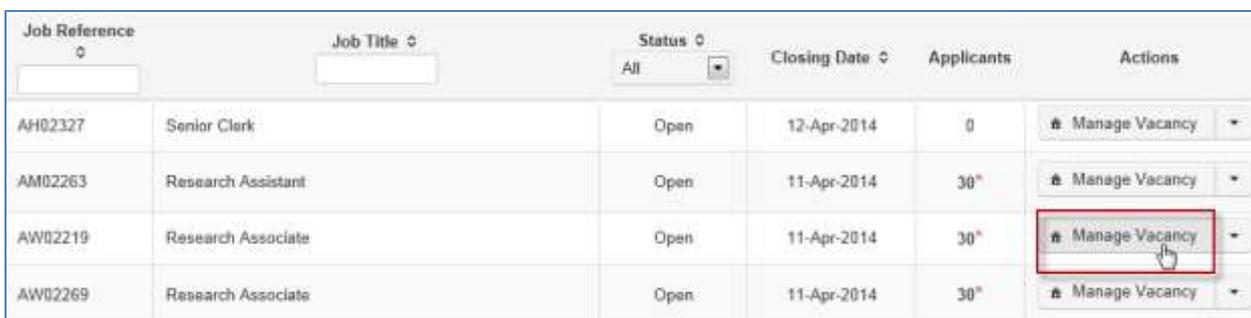
Log in to the HR Admin Panel. The **Vacancies** Tab will display all the vacancies that you have access to.



The screenshot shows the 'Vacancies' tab in the HR Admin Web Application. It features a search bar, a 'Find Applicant' button, and a checkbox for 'Show vacancies with recruitment complete'. Below this is a table of vacancies with columns for Job Reference, Job Title, Status, Closing Date, Applicants, Actions, and Access. The table contains 10 rows of data, with the first row highlighted in green and the next two in yellow. A pagination bar at the bottom shows '(1 of 5)' and page numbers 1 through 5.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions	Access
AG04267	eProcurement Administrator (Chief Clerk)	Advert live	31-Jan-2015	0	Manage Vacancy	Administrator
AH04029	Research Associate	Advert live	31-Dec-2015	1	Manage Vacancy	Administrator
AH04031	Research Associate Test3	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04036	Research Associate SV TEST 1	Advert live	31-Dec-2015	0	Manage Vacancy	Administrator
AH04233	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04235	Programme Leader	Advert closed	01-Jan-2015	0	Manage Vacancy	Administrator
AH04238	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04240	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04242	Principal Research Associate	Advert closed	04-Jan-2015	0	Manage Vacancy	Administrator
AH04251	Principal Research Associate	Advert live	08-Jan-2015	0	Manage Vacancy	Administrator

Locate the vacancy for which you wish to send out reference requests. Click on the **Manage Vacancy** button.



This is a close-up of the table from the previous screenshot, showing four rows. The 'Manage Vacancy' button for the third row (AW02219) is highlighted with a red box and a mouse cursor.

Job Reference	Job Title	Status	Closing Date	Applicants	Actions
AH02327	Senior Clerk	Open	12-Apr-2014	0	Manage Vacancy
AM02263	Research Assistant	Open	11-Apr-2014	30*	Manage Vacancy
AW02219	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy
AW02269	Research Associate	Open	11-Apr-2014	30*	Manage Vacancy

The **Vacancy Overview** screen will be displayed:

HR / HR Admin Web Application

[Vacancies](#) | [Offers](#) | [HR Processing](#) | [Reports](#) | [Admin](#) | [Logout](#)

AH04339: Programming Officer[Non-Clinical-Research]

Vacancy Overview

Applicants

Process Applicants (28)

Manage Manual Applicants (0)

Vacancy Configuration

Tasks

Manage Rejection Correspondence

Manage Reference Requests

Manage CoS Requests (1)

Correspondence

Awaiting Confirmation (0)

Completed and Others (1)

View or Record Correspondence

Permissions

Notes (0)

Attachments (0)

Vacancy overview

Finished recruiting? [Complete recruitment for this vacancy](#)

Welcome to the vacancy management area, from here you are able to:

- View and manage applications to this vacancy
- Handle rejection communications and reference requests
- Manage vacancy permissions
- View and confirm tasks relating to this vacancy
- Maintain vacancy notes and attachments

Applicant & referees report

Download an Excel workbook containing three worksheets: an applicant contact details list, a referee contact details list, and an applicant list without contact details.

Applicant & referee report

Positions available for this vacancy

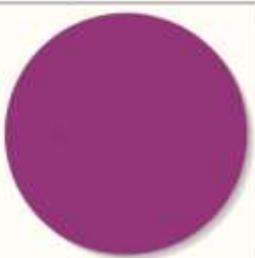
The following positions can be appointed for this vacancy. If there are no positions listed, and it has been at least 24 hours since you set up this vacancy on RAS, please contact the CHRIS Helpdesk.

	Offer in progress?	Earliest start date
70033200: Programming Officer[Non-Clinical-Research]	Ravi Choudary	20-Jan-2015

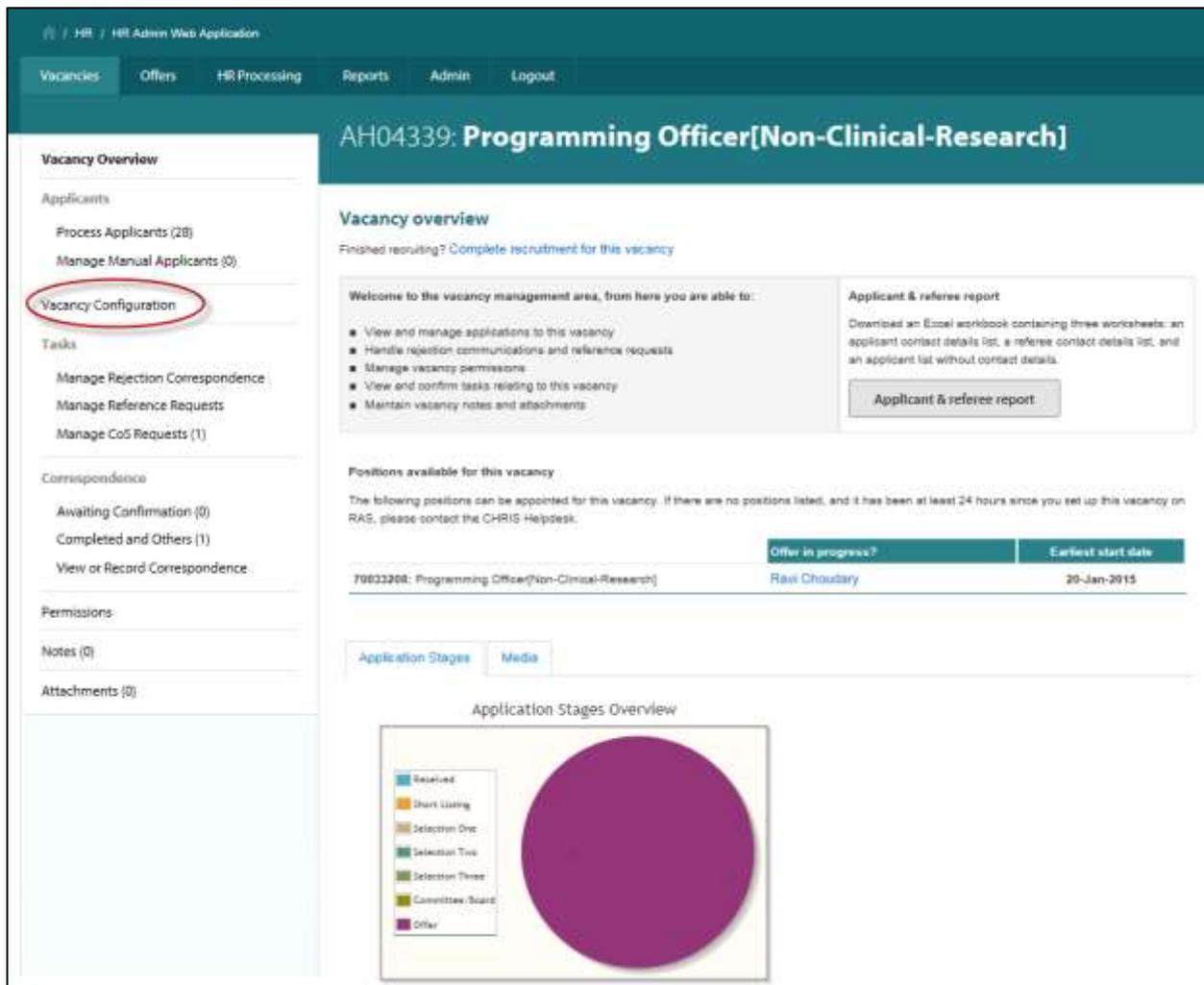
[Application Stages](#) | [Media](#)

Application Stages Overview

- Rejected
- Short Listing
- Selection One
- Selection Two
- Selection Three
- Committee Board
- Offer



Select **Vacancy Configuration**.



The screenshot displays the 'HR Admin Web Application' interface. The top navigation bar includes 'Vacancies', 'Offers', 'HR Processing', 'Reports', 'Admin', and 'Logout'. The main header shows the vacancy ID 'AH04339: Programming Officer[Non-Clinical-Research]'. On the left-hand side, a menu lists various options: 'Applicants' (Process Applicants (28), Manage Manual Applicants (0), and **Vacancy Configuration**), 'Tasks' (Manage Rejection Correspondence, Manage Reference Requests, Manage CoS Requests (1)), 'Correspondence' (Awaiting Confirmation (0), Completed and Others (1), View or Record Correspondence), 'Permissions', 'Notes (0)', and 'Attachments (0)'. The 'Vacancy Configuration' option is circled in red. The main content area shows a 'Vacancy overview' section with a list of tasks, an 'Applicant & referee report' button, and a table of positions available for the vacancy.

	Offer in progress?	Earliest start date
7063268: Programming Officer[Non-Clinical-Research]	Ravi Choudhary	20-Jan-2015

Below the table, there are tabs for 'Application Stages' and 'Media'. The 'Application Stages Overview' section features a pie chart with a legend:

- Selected
- Short Listing
- Selection One
- Selection Two
- Selection Three
- Committee Board
- Other

If you have not done so already, enter the contact information for the vacancy. If you are an administrator sending letters on behalf of a colleague then you may enter another person's details into these fields.

General Configuration | All Correspondence | Reference Correspondence | Retention Policy

Configure Contact Information

Contact information is applicable to all correspondence. Details entered here will be included as the contact details for rejection and reference requests emails as well as the from fields of generated letters.

Your title * Dr	Contact email address: * AH00167@a.com
Contact name: * AH00167-Name	Address: * Address AH00167 Line 1 Address AH00167 Line 2 Address AH00167 Line 3 Address AH00167 Line 4
Contact job title: * AH00167-Contact Job Title	
Contact phone number: * AH00167-Telephone	Mark Contact Configuration as complete? <input checked="" type="checkbox"/>

Save Configuration

Please note that if you update the contact information at any point, all correspondence that you have already generated, and which is awaiting confirmation, will be updated with the amended details. If you do not wish this to happen, you can confirm awaiting confirmation tasks before making a change to the contact information

Once the Contact Information is complete, ensure that you check the **Mark Contact Configuration as complete** check box and click on **Save Configuration**.

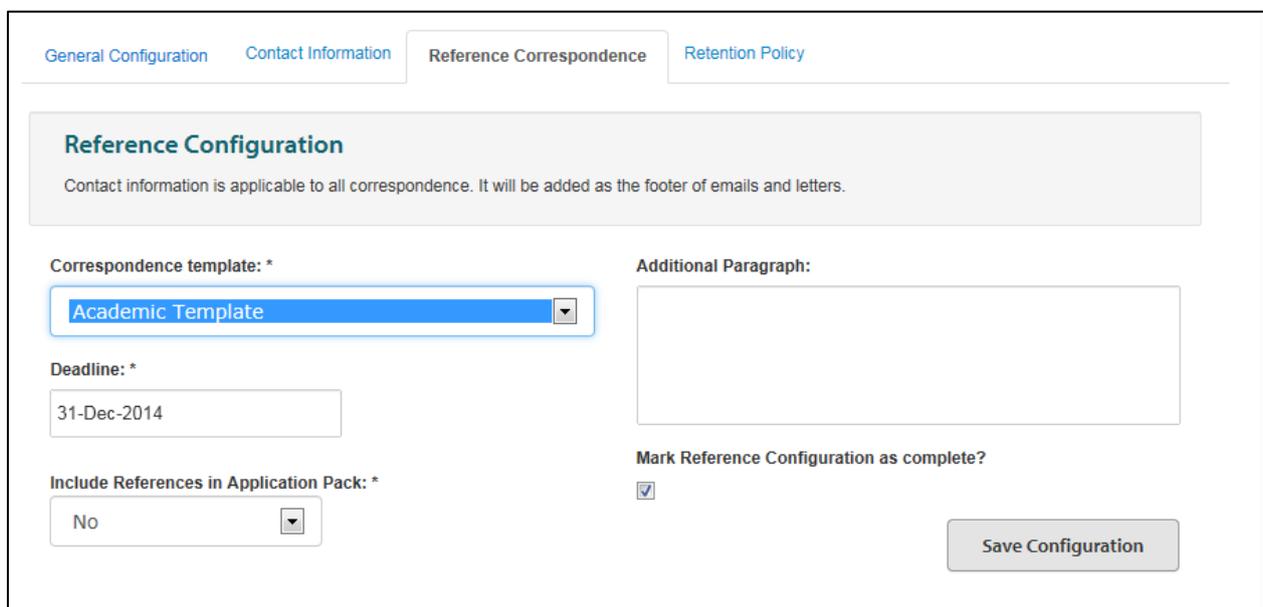
Mark Contact Configuration as complete?

Save Configuration

Select the second tab in this window, **Reference Correspondence**



Select the reference request template that you wish to use.

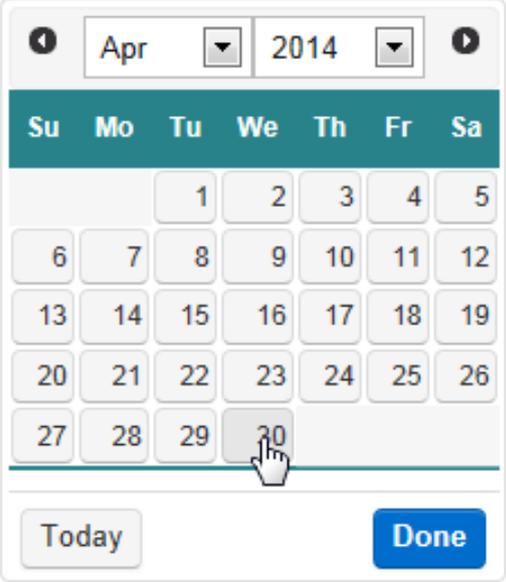


Three templates have been developed:

- An academic template to assess an individual’s academic standing and potential, paying particular attention to his/her performance in teaching and research.
- A non-academic template for a general assessment of the individual’s suitability for the role.
- A non-academic form that is similar to the old PD15 form (i.e. a structured template for the referee’s assessment, which asks specific questions about generic skills, whether they would re-employ the individual etc.).

Enter the preferred date by which you would like referees to have responded to your request.

Deadline: *



The calendar widget shows the month of April 2014. The days of the week are listed at the top: Su, Mo, Tu, We, Th, Fr, Sa. The dates are arranged in a grid. A mouse cursor is pointing at the date 30. At the bottom of the calendar, there are two buttons: 'Today' and 'Done'.

Once you have finished configuring contact information, click on the check box to **Mark Reference Correspondence as complete** and click the **Save Configuration** button.



Note: You also have the option on this screen to decide whether the returned references ought to be included in the application pack for members of the Appointing Body to review. The default is not to include them. Please see the [Request references](#) section of the Recruitment Guidance for information on when and when not to use references as part of the selection process.



Step 2 – Identify the applicant(s) and initiate a reference task

Select **Manage Reference Request** from the Tasks section of the navigation menu.

HR / HR Admin Web Application
Vacancies | Offers | Reports | Admin | Logout

DC04259: Research Assistant/Associate

Vacancy Overview

Applicants

- Process Applicants (34)
- Manage Manual Applicants (0)

Vacancy Configuration

Tasks

- Manage Rejection Correspondence
- Manage Reference Requests
- Manage CoS Requests (5)

Correspondence

- Awaiting Confirmation (3)
- Completed and Others (0)
- View or Record Correspondence

Permissions

Notes (0)

Attachments (0)

Request References

From this section you will be able to request references automatically from referees who were supplied with an email address and for applicants who have given their consent for a referee to be contacted at this stage.

Select a stage to begin requesting references:

Received ▼

	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>	<input type="text"/>				▼	
<input type="checkbox"/>	Gpoi, Vamshi	Mr Ella Ackley	+ Add Reference ▼	Email	Not Started	
<input type="checkbox"/>	Gpoi, Vamshi	Not Contactable	+ Add Reference ▼		Not Contactable	
<input type="checkbox"/>	Kapoor, Anil	Mr Amelia Abner	+ Add Reference ▼	Email	Awaiting Confirmation	
<input type="checkbox"/>	Kapoor, Anil	Not Contactable	+ Add Reference ▼		Not Contactable	
<input type="checkbox"/>	Karamkanty, Ajay	Mr Abby Abbey	+ Add Reference ▼	Email	Not Started	
<input type="checkbox"/>	Karamkanty, Ajay	Not Contactable	+ Add Reference ▼		Not Contactable	
<input type="checkbox"/>	Kumar, Mahesh	Mr Daisy Ackerman	+ Add Reference ▼	Email	Awaiting Confirmation	
<input type="checkbox"/>	Kumar, Mahesh	Not Contactable	+ Add Reference ▼		Not Contactable	
<input type="checkbox"/>	Nayak, Samir	Mr Emily Acock	+ Add Reference ▼	Email	Not Started	
<input type="checkbox"/>	Nayak, Samir	Not Contactable	+ Add Reference ▼		Not Contactable	

(1 of 5) ◀ ◁ ▷ ▶ 1 2 3 4 5 ▶ ▷▶ 10

Request References

Select the stage of the process that you are currently working in from the drop down box.

Request References

From this section you will be able to request referees happy for their referees to be contacted.

Select a stage to begin requesting references

Stage: -- Please Select --

- Please Select --
- Received
- Short Listing
- Selection One**
- Selection Two
- Selection Three
- Committee/Board
- Offer

No Referees to view, use the filter above to s

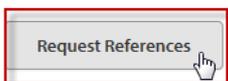
The applicants at this stage and their referees will be displayed. Where the applicant has indicated on the application form that they do not wish the referee to be contacted before they have been made an offer, the referee will be displayed in grey and shown as not contactable until the applicant is recorded in the system as having accepted an offer.

<input type="checkbox"/>	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>	Butcher, Jeremy	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Butcher, Jeremy	Dr Test2 Test2	+ Upload	Email	Not Started	
<input type="checkbox"/>	Collins, Gemma	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Collins, Gemma	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Croxford, Carl	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Croxford, Carl	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Curtis, James	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Curtis, James	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Davies, Edward	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Davies, Edward	Dr Test2 Test2	+ Upload	Email	Not Started	

Select the applicants for whom you wish to send a reference request and click on **Request References**.

<input checked="" type="checkbox"/>	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>	<input type="text"/>					
<input type="checkbox"/>	Butcher, Jeremy	Not Contactable	+ Upload		Not Contactable	
<input checked="" type="checkbox"/>	Butcher, Jeremy	Dr Test2 Test2	+ Upload	Email	Not Started	
<input checked="" type="checkbox"/>	Collins, Gemma	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Collins, Gemma	Not Contactable	+ Upload		Not Contactable	
<input checked="" type="checkbox"/>	Croxford, Carl	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Croxford, Carl	Not Contactable	+ Upload		Not Contactable	
<input checked="" type="checkbox"/>	Curtis, James	Mr Test1 Test1	+ Upload	Email	Not Started	
<input type="checkbox"/>	Curtis, James	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Davies, Edward	Not Contactable	+ Upload		Not Contactable	
<input checked="" type="checkbox"/>	Davies, Edward	Dr Test2 Test2	+ Upload	Email	Not Started	

(1 of 1) 1 10



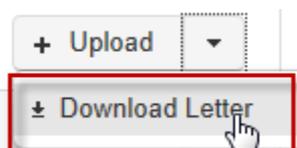
A confirmation message will be displayed and Awaiting Confirmation will be displayed in the status column for the referees that have been selected.

<input type="checkbox"/>	Applicant	Referee	Action	Type	Status	File
<input type="checkbox"/>	<input type="text"/>					
<input type="checkbox"/>	Butcher, Jeremy	Not Contactable	+ Upload		Not Contactable	
<input type="checkbox"/>	Butcher, Jeremy	Dr Test2 Test2	+ Upload	Email	Awaiting Confirmation	
<input type="checkbox"/>	Collins, Gemma	Mr Test1 Test1	+ Upload	Email	Awaiting Confirmation	

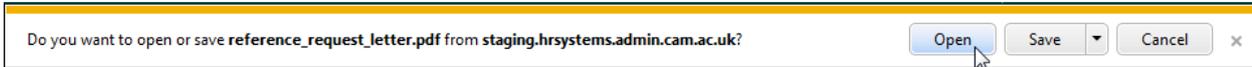
Reference Requests Generated
Reference requests have been generated are awaiting confirmation



Note: You can use the automated reference template as the basis for your manual reference request by clicking on the drop-down menu next to the **Upload** button and then selecting **Download Letter**.



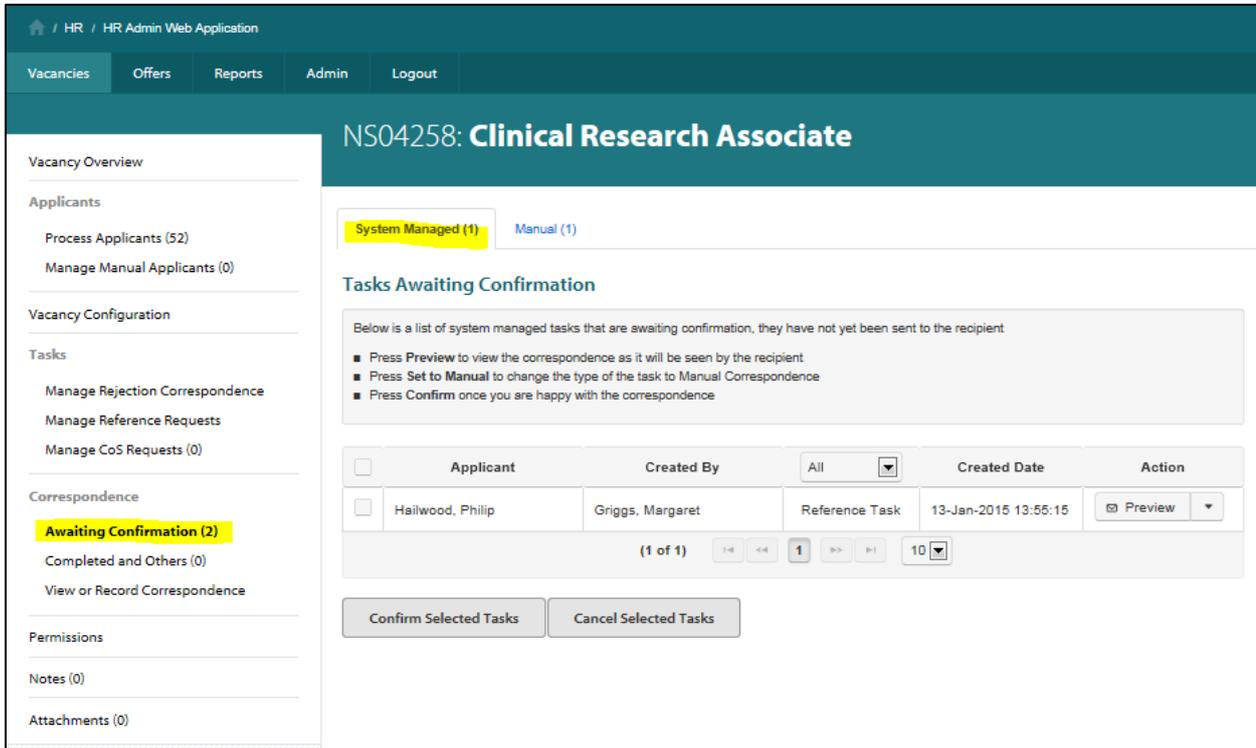
Select **Open** in the pop-up window.



This will open a PDF that you can copy (or edit in Adobe Acrobat)



A reference task will also have been created under the **System Managed** tab on the **Correspondence awaiting confirmation** menu:



The screenshot shows the HR Admin Web Application interface. The main header includes navigation tabs: Vacancies, Offers, Reports, Admin, and Logout. The current page title is 'NS04258: Clinical Research Associate'. On the left, a sidebar menu lists various sections: Vacancy Overview, Applicants (with sub-items 'Process Applicants (52)' and 'Manage Manual Applicants (0)'), Vacancy Configuration, Tasks (with sub-items 'Manage Rejection Correspondence', 'Manage Reference Requests', and 'Manage CoS Requests (0)'), Correspondence (with sub-items 'Awaiting Confirmation (2)', 'Completed and Others (0)', and 'View or Record Correspondence'), Permissions, Notes (0), and Attachments (0). The 'Awaiting Confirmation (2)' item is highlighted in yellow.

The main content area shows two tabs: 'System Managed (1)' (highlighted in yellow) and 'Manual (1)'. Below the tabs is the section 'Tasks Awaiting Confirmation'. A text box explains: 'Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient'. It lists three actions: 'Press Preview to view the correspondence as it will be seen by the recipient', 'Press Set to Manual to change the type of the task to Manual Correspondence', and 'Press Confirm once you are happy with the correspondence'.

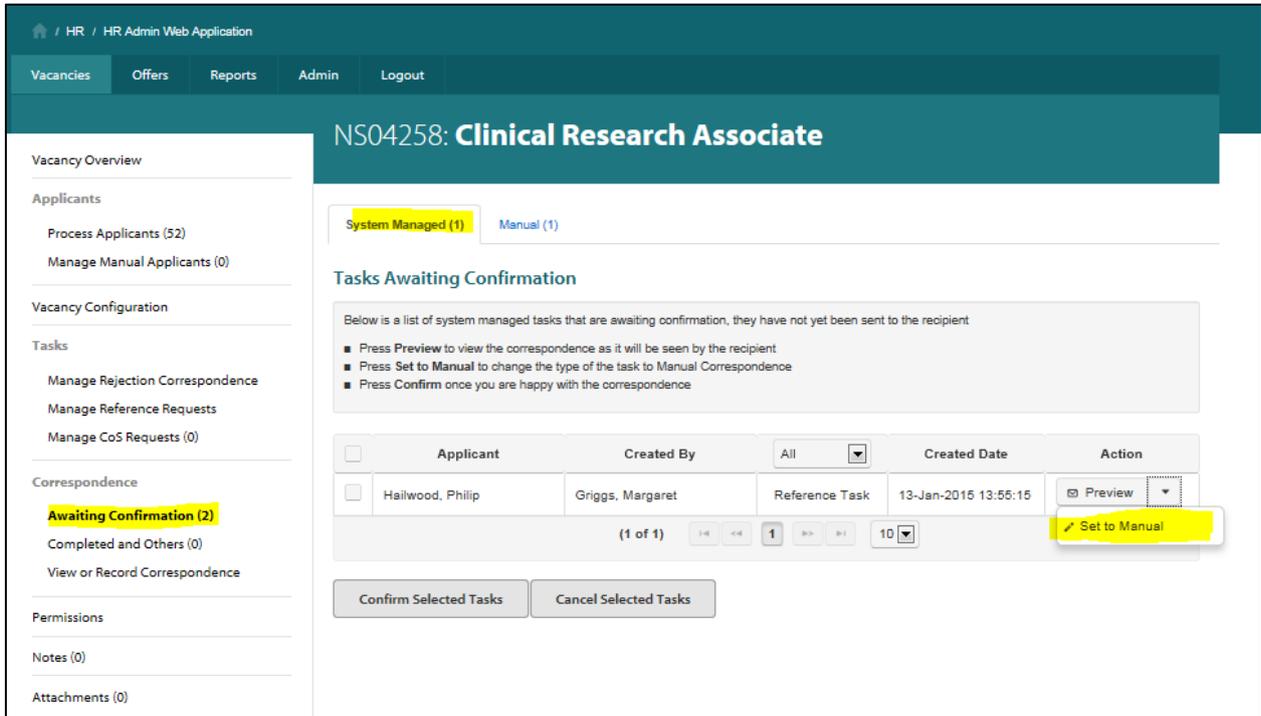
A table displays the task details:

<input type="checkbox"/>	Applicant	Created By	All	Created Date	Action
<input type="checkbox"/>	Hailwood, Philip	Griggs, Margaret	Reference Task	13-Jan-2015 13:55:15	<input type="button" value="Preview"/> ▾

Below the table, there is a pagination control showing '(1 of 1)' and a page number '1' out of '10'. At the bottom of the section are two buttons: 'Confirm Selected Tasks' and 'Cancel Selected Tasks'.

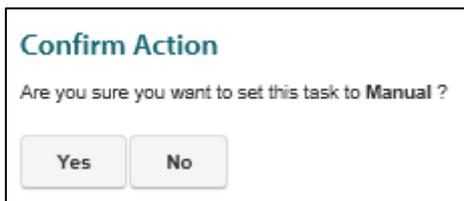
Step 3 – Set the reference task to manual

You can now switch the reference to manual by selecting **Set to manual** from the actions menu.



The screenshot shows the HR Admin Web Application interface. The main heading is 'NS04258: Clinical Research Associate'. On the left, there is a navigation menu with sections: Vacancies Overview, Applicants (Process Applicants (52), Manage Manual Applicants (0)), Vacancy Configuration, Tasks (Manage Rejection Correspondence, Manage Reference Requests, Manage CoS Requests (0)), Correspondence (Awaiting Confirmation (2), Completed and Others (0), View or Record Correspondence), Permissions, Notes (0), and Attachments (0). The 'Awaiting Confirmation (2)' link is highlighted in yellow. The main content area shows 'Tasks Awaiting Confirmation' with a list of system managed tasks. A task for 'Hailwood, Philip' created by 'Griggs, Margaret' on '13-Jan-2015 13:55:15' is shown. The task type is 'Reference Task'. The 'Action' column for this task has a dropdown menu with 'Preview' and 'Set to Manual' (highlighted in yellow) options. Below the table are 'Confirm Selected Tasks' and 'Cancel Selected Tasks' buttons.

You will be asked to confirm the action:



The confirmation dialog box has a title 'Confirm Action' and the text 'Are you sure you want to set this task to Manual?'. Below the text are two buttons: 'Yes' and 'No'.

When you refresh the screen the task will then be shown under the **Manual** tab:

System Managed (2)
Manual (1)

Manual Tasks Awaiting Confirmation

Below is a list of manual tasks that are awaiting manual correspondence to be recorded

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to System Managed** to change the type of the task to System Managed
- Press **Confirm** once you are happy with the correspondence

<input type="checkbox"/>	Applicant ↕	Created By	All ▼	Created Date	Action
<input type="checkbox"/>	Kumar, Mahesh	Griggs, Margaret	Reference Task	09-Jan-2015 15:39:32	✉ Record Correspondence ▼

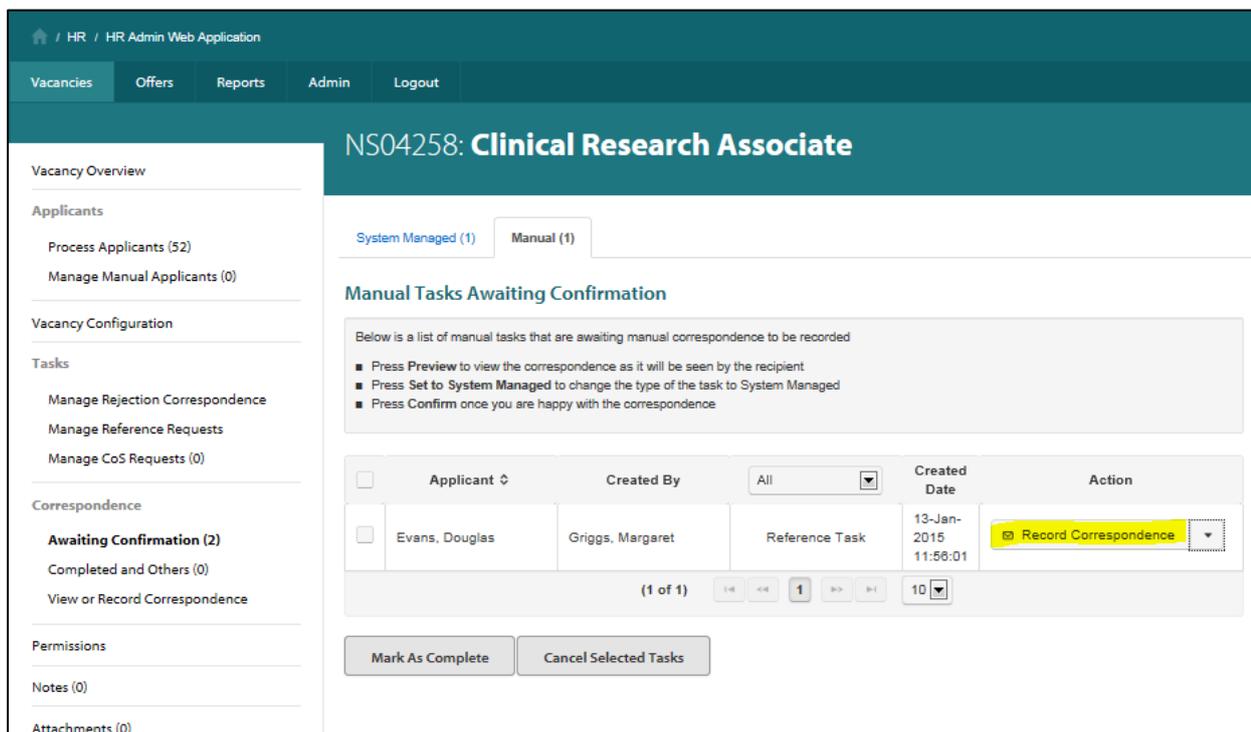
(1 of 1)
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10
▼

Mark As Complete

Cancel Selected Tasks

Step 4 - Record details of the correspondence sent to the applicant

Click on **Record correspondence** under the action menu:



HR Admin Web Application

Vacancies | Offers | Reports | Admin | Logout

NS04258: **Clinical Research Associate**

System Managed (1) | Manual (1)

Manual Tasks Awaiting Confirmation

Below is a list of manual tasks that are awaiting manual correspondence to be recorded

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to System Managed** to change the type of the task to System Managed
- Press **Confirm** once you are happy with the correspondence

<input type="checkbox"/>	Applicant	Created By		Created Date	Action
<input type="checkbox"/>	Evans, Douglas	Griggs, Margaret	Reference Task	13-Jan-2015 11:58:01	Record Correspondence

(1 of 1) | 10

Mark As Complete | Cancel Selected Tasks

Complete the details of the correspondence:

Record Manual Correspondence

This screen allows you to manually add records of any correspondence made that could not be automatically completed by the system. Once added to the system this correspondence will be visible in the audit history for this vacancy.

Sender: Receiver:

Date Sent: Type:

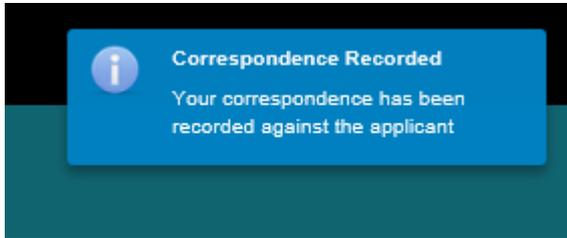
Subject:

Content:

Click on the **Record Correspondence** button:

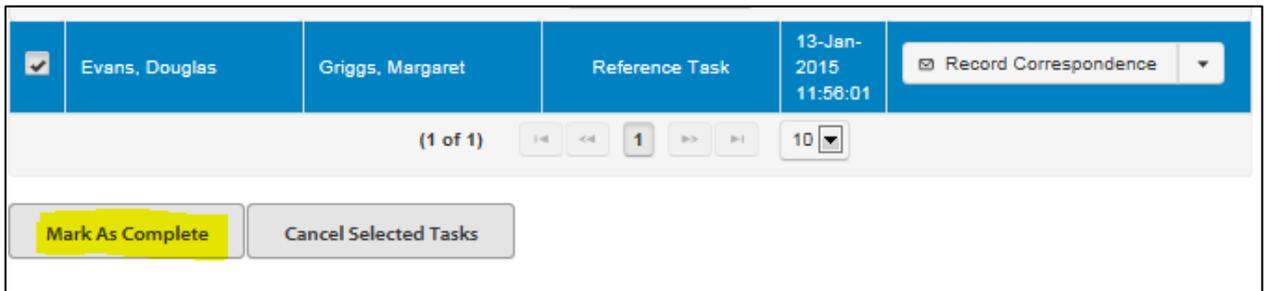


A confirmation message will be displayed in the top right hand corner of the screen:

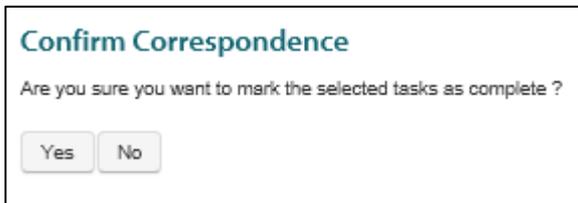


 Note: You can also mark the task as complete on this screen:

Select the task and then click on the **Mark complete** button.



Confirm the actions:



The task will be moved to the **Correspondence - Completed and others** menu.



/ HR / HR Admin Web Application

[Vacancies](#)
[Offers](#)
[Reports](#)
[Admin](#)
[Logout](#)

NS04258: Clinical Research Associate

Vacancy Overview

Applicants

- Process Applicants (52)
- Manage Manual Applicants (0)

Vacancy Configuration

Tasks

- Manage Rejection Correspondence
- Manage Reference Requests
- Manage CoS Requests (0)

Correspondence

- Awaiting Confirmation (1)
- Completed and Others (1)**
- View or Record Correspondence

Permissions

Notes (0)

Attachments (0)

Tasks - Completed and Others

Below is a list of all other tasks including completed and errored tasks

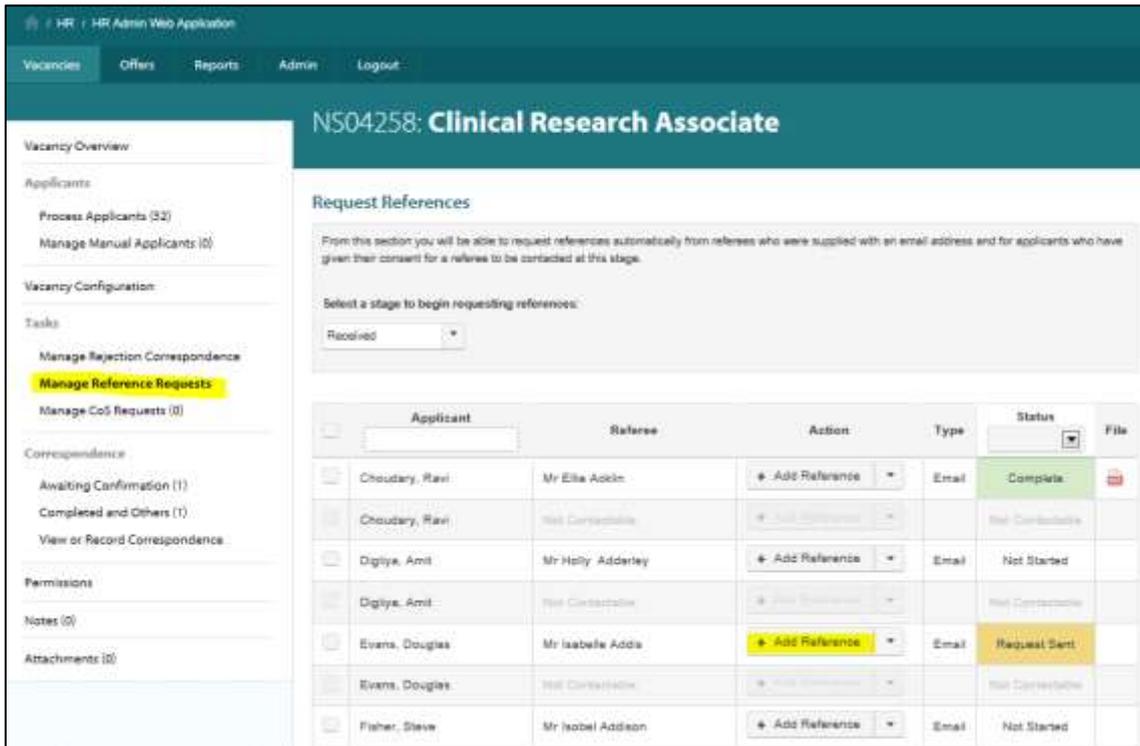
	All	Type	Completed	Action	All	Click for Details
Evans, Douglas	Reference Task	Letter	13-Jan-2015 14:40:31	View	Reference Sent	ⓘ

1

Step 5 – Upload the returned reference

Once a referee has returned a reference, it can be uploaded against the applicant’s record in Web Recruitment.

On the **Manage reference requests** menu click on **Add reference**.



Request References

From this section you will be able to request references automatically from referees who were supplied with an email address and for applicants who have given their consent for a referee to be contacted at this stage.

Select a stage to begin requesting references:

Received

Applicant	Referee	Action	Type	Status	File
Choudary, Ravi	Mr Ella Addis	+ Add Reference	Email	Complete	
Choudary, Ravi	Not Contactable	+ Add Reference		Not Contactable	
Digiya, Amit	Mr Holly Adderley	+ Add Reference	Email	Not Started	
Digiya, Amit	Not Contactable	+ Add Reference		Not Contactable	
Evans, Douglas	Mr Isabelle Addis	+ Add Reference	Email	Request Sent	
Evans, Douglas	Not Contactable	+ Add Reference		Not Contactable	
Fisher, Steve	Mr Isabel Addison	+ Add Reference	Email	Not Started	

Complete the details of the returned reference and click on **Submit Reference**.

Attach Reference

This screen allows you to upload a reference for a candidate. If **Include References in Application Pack** is set to 'yes' for this vacancy, then the reference will appear as part of this candidate's application pack.

Referee Name: Mr Isabelle Addis

Contact Email: douglas.gibson@admin.cam.ac.uk

Organisation: Mencap

Role in Organisation: Payroll Manager

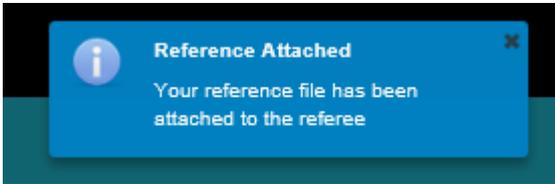
Upload Reference File:

+ Choose

File Name	Uploaded Time	Action
M:\My Documents\reference v1	13-Jan-2015 14:47:34	Delete

Submit Reference

A message will be displayed in the top right of the screen in order to confirm the action.



The uploaded reference will appear as an icon next to the reference task.

<input type="checkbox"/>	Evans, Douglas	Mr Isabelle Addis	+ Add Reference ▾	Email	Complete	
--------------------------	----------------	-------------------	-------------------	-------	----------	---

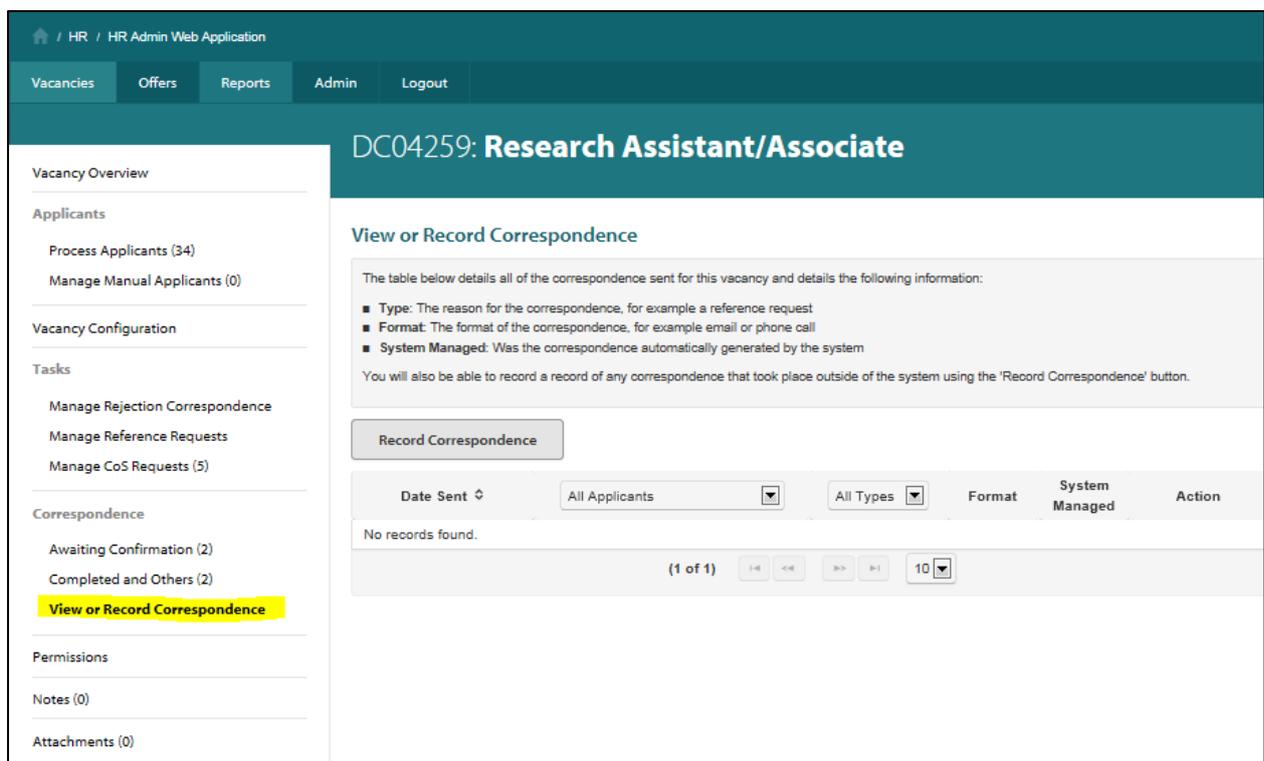


Note: You can click on the icon to view the reference again.

7. Recording other correspondence and viewing history

You can use this screen to view all system managed correspondence and also to record other non-system correspondence such as other emails, letters and phone calls to applicants.

Select **View or Record Correspondence** from the **Correspondence** section on the left of the screen.



The screenshot shows the HR Admin Web Application interface for vacancy DC04259: Research Assistant/Associate. The sidebar on the left contains the following sections:

- Vacancy Overview
- Applicants
 - Process Applicants (34)
 - Manage Manual Applicants (0)
- Vacancy Configuration
- Tasks
 - Manage Rejection Correspondence
 - Manage Reference Requests
 - Manage CoS Requests (5)
- Correspondence
 - Awaiting Confirmation (2)
 - Completed and Others (2)
 - View or Record Correspondence** (highlighted)
- Permissions
- Notes (0)
- Attachments (0)

The main content area is titled "View or Record Correspondence" and includes the following information:

The table below details all of the correspondence sent for this vacancy and details the following information:

- **Type:** The reason for the correspondence, for example a reference request
- **Format:** The format of the correspondence, for example email or phone call
- **System Managed:** Was the correspondence automatically generated by the system

You will also be able to record a record of any correspondence that took place outside of the system using the 'Record Correspondence' button.

Record Correspondence

Date Sent	All Applicants	All Types	Format	System Managed	Action
No records found.					

(1 of 1) 1-4 <-4 >4- 10

To record other types of non-system correspondence, select **Record Correspondence**.

View or Record Correspondence

The table below details all of the correspondence sent for this vacancy and details the following information:

- **Type:** The reason for the correspondence, for example a reference request
- **Format:** The format of the correspondence, for example email or phone call
- **System Managed:** Was the correspondence automatically generated by the system

You will also be able to record a record of any correspondence that took place outside of the system using the 'Record Correspondence' button.

Record Correspondence

Date Sent ↕	All Applicants	All Types	Format	System Managed	Action
20-Mar-2014 11:29:32	Butcher, Jeremy	Reference	Email	Yes	View
20-Mar-2014 11:29:32	Collins, Gemma	Reference	Email	Yes	View

The **Record Correspondence** window will be displayed.

Record Correspondence ✕

This window can be used to make a record of correspondence sent to people outside of the system.

Applicant:

--- Please Select ---

Date:

Summary/Subject:

Details:

Contact Type:

--- Please Select ---

Contact Format:

--- Please Select ---

To (email address, phone number etc.):

Record Correspondence

Cancel

Select the relevant applicant from the drop down list. Select the Contact Type and Contact Format; enter the Date, Summary/Subject and Details. Once complete, click on the **Record Correspondence** button.

Record Correspondence

This window can be used to make a record of correspondence sent to people outside of the system.

Applicant: Contact Type:

Date: Contact Format:

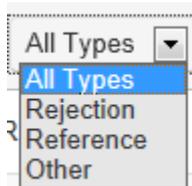
Summary/Subject: To (email address, phone number etc.):

Details:

The entry will appear in the table.

Date Sent	All Applicants	All Types	Format	System Managed	Action
20-Mar-2014 16:04:09	Butcher, Jeremy	Other	Telephone	No	View

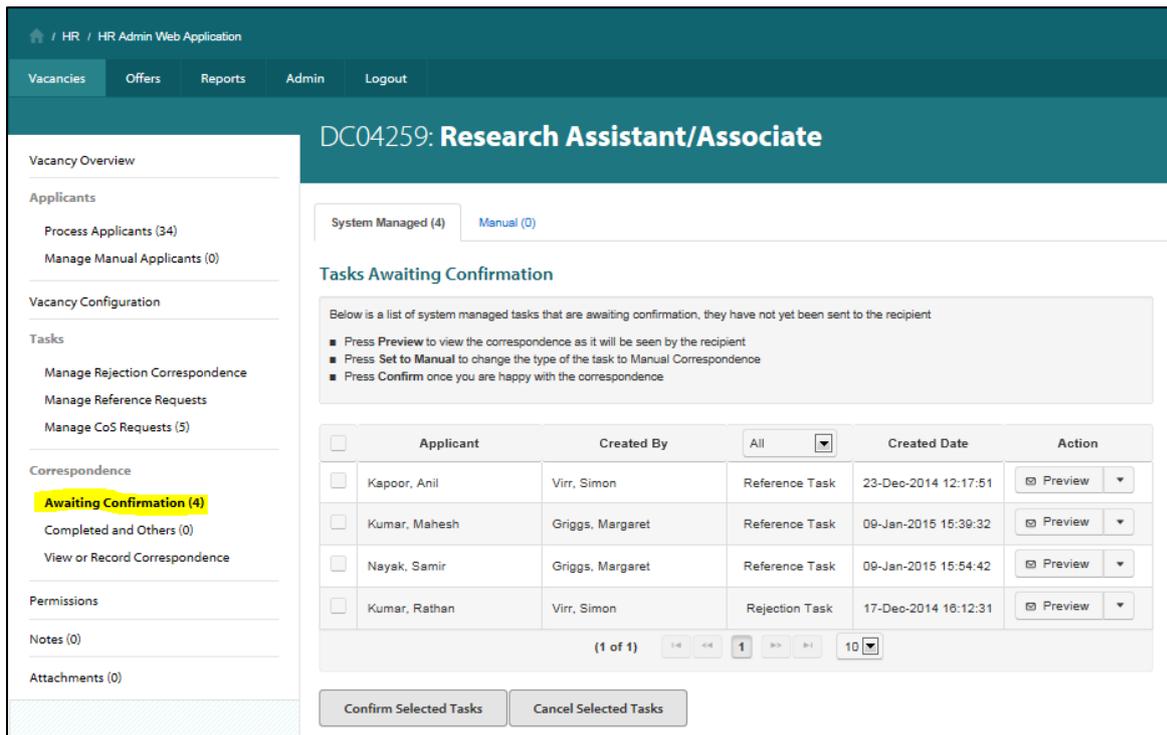
All correspondence will be listed; you can choose to filter by Rejection, Reference or Other if required.



8. Cancelling a correspondence task

Please note that before you undertake this task you should ensure that the vacancy configuration information is complete. See previous section.

If you wish to cancel any type of correspondence task you can do this from the **Correspondence Awaiting Confirmation** menu option on the left menu bar.



The screenshot shows the HR Admin Web Application interface. The main header displays the vacancy ID 'DC04259: Research Assistant/Associate'. The left sidebar contains a navigation menu with 'Correspondence' expanded to show 'Awaiting Confirmation (4)'. The main content area is titled 'Tasks Awaiting Confirmation' and includes instructions for managing these tasks. Below the instructions is a table listing tasks with columns for Applicant, Created By, Task Type, Created Date, and Action.

<input type="checkbox"/>	Applicant	Created By	All	Created Date	Action
<input type="checkbox"/>	Kapoor, Anil	Virr, Simon	Reference Task	23-Dec-2014 12:17:51	Preview
<input type="checkbox"/>	Kumar, Mahesh	Griggs, Margaret	Reference Task	09-Jan-2015 15:39:32	Preview
<input type="checkbox"/>	Nayak, Samir	Griggs, Margaret	Reference Task	09-Jan-2015 15:54:42	Preview
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview

At the bottom of the table, there are pagination controls showing '(1 of 1)' and a 'Cancel Selected Tasks' button.

Tick the task you wish to cancel and click on **Cancel Selected Tasks**.

System Managed (2)
Manual (1)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to Manual** to change the type of the task to Manual Correspondence
- Press **Confirm** once you are happy with the correspondence

	Applicant	Created By	All	Created Date	Action
<input checked="" type="checkbox"/>	Kapoor, Anil	Virr, Simon	Reference Task	23-Dec-2014 12:17:51	Preview
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview

(1 of 1)
←
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10

Confirm Selected Tasks
Cancel Selected Tasks

You will be asked to confirm the cancellation.

Confirm Cancellation

Are you sure you want to **cancel** the selected tasks ?

Note: For Rejection Tasks, the status of the associated candidates will remain as **Rejected**

Yes
No

When you refresh the screen the task will have been removed.

System Managed (1)
Manual (1)

Tasks Awaiting Confirmation

Below is a list of system managed tasks that are awaiting confirmation, they have not yet been sent to the recipient

- Press Preview to view the correspondence as it will be seen by the recipient
- Press Set to Manual to change the type of the task to Manual Correspondence
- Press Confirm once you are happy with the correspondence

	Applicant	Created By	All	Created Date	Action
<input type="checkbox"/>	Kumar, Rathan	Virr, Simon	Rejection Task	17-Dec-2014 16:12:31	Preview

(1 of 1)
<<
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1
>
>>
10

Confirm Selected Tasks
Cancel Selected Tasks

 Note: You will not be able to complete recruitment for a vacancy when tasks are outstanding so you should cancel or revert any remaining tasks to manual before closing the vacancy.

It is strongly recommended that you revert the outstanding tasks to manual so that you have the opportunity to record the alternative non-system method of contact you used for the task. This has the advantage of providing a clear audit trail should any queries/issues, or an internal recruitment audit, occur in the future.

 Note: It is very important that you mark recruitment as complete for a vacancy within 12 months of the closing date for online applications when:

- A recruitment process has been successful, all unsuccessful applicants have been rejected and all successful applicants have been transferred to CHRIS from the offers stage in Web Recruitment, or
- The recruitment process was unsuccessful and no successful candidates were taken forward from one of the selection stages.

Marking a vacancy as complete will perform a number of actions within the system to benefit departments and Institutions. A vacancy marked as complete will:

- Be purged of applicant identifiable data automatically 12 months after the closing date in accordance with the University’s recruitment document retention policy(unless a the successful applicant required a Tier 2 CoS or the standard purging schedule has been overridden with approval from HR);
- Have any successful candidate information saved as a PDF snapshot for future use;
- Not appear in a user’s list of vacancies (unless a user actively chooses for complete vacancies to be displayed).

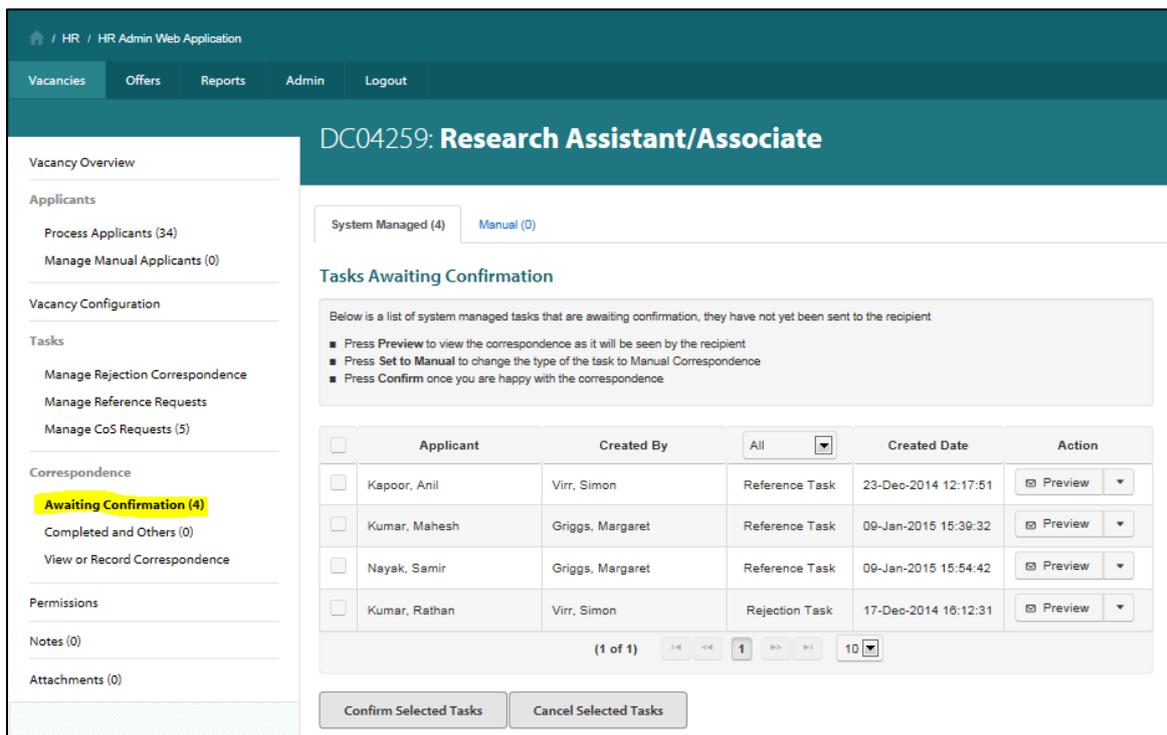


See the guide to Managing Vacancies and Applicants on the [HR Systems pages](#) for more details.

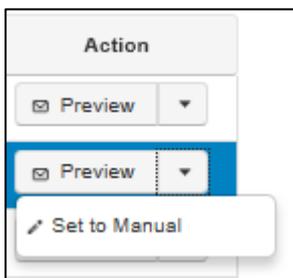
9. Switching a correspondence task back to manual

Please note that before you undertake this task you should ensure that the vacancy configuration information is complete. See previous section.

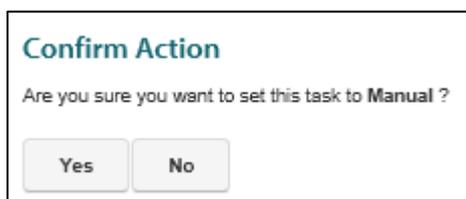
If you wish to switch any type of automated correspondence task back to manual you can do this from the **Correspondence Awaiting Confirmation** menu option on the left menu bar.



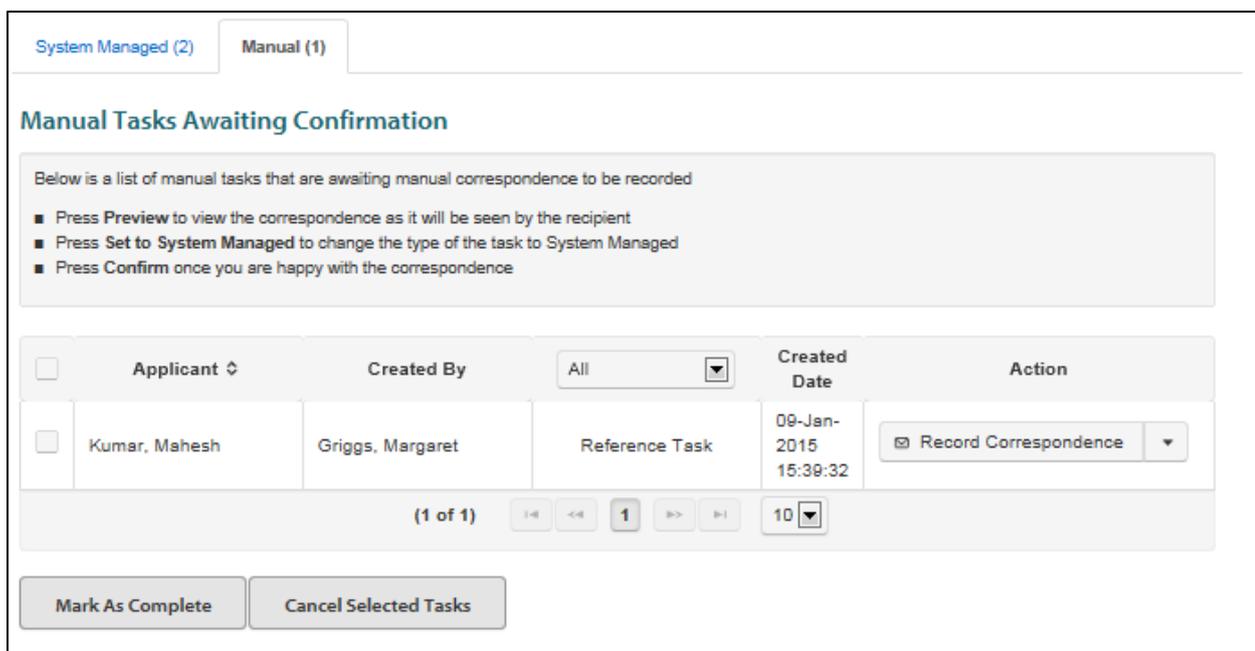
- 1 Tick the task you wish to process and click on **Set to Manual** using the option on the actions menu.



- 2 You will be asked to confirm the action.



3 When you refresh the screen the task will then be shown under the **Manual** tab so that you can record the manual correspondence you have decided to send.



System Managed (2) Manual (1)

Manual Tasks Awaiting Confirmation

Below is a list of manual tasks that are awaiting manual correspondence to be recorded

- Press **Preview** to view the correspondence as it will be seen by the recipient
- Press **Set to System Managed** to change the type of the task to System Managed
- Press **Confirm** once you are happy with the correspondence

<input type="checkbox"/>	Applicant ↕	Created By	All ▾	Created Date	Action
<input type="checkbox"/>	Kumar, Mahesh	Griggs, Margaret	Reference Task	09-Jan-2015 15:39:32	Record Correspondence ▾

(1 of 1) 1 10 ▾

Mark As Complete Cancel Selected Tasks

Note that you will not be able to complete recruitment for a vacancy when tasks are outstanding so you should cancel or revert any remaining tasks to manual before closing the vacancy.

It is strongly advised that you revert the outstanding tasks to manual so that you have the opportunity to record the alternative non-system method of contact you used for the task. This has the advantage of providing a clear audit trail should any issues/queries, or an internal recruitment audit, occur in the future.

 **Note:** It is important that you mark recruitment as complete for a vacancy within 12 months of the closing date for online applications when:

- A recruitment process has been successful, all unsuccessful applicants have been rejected and all successful applicants have been transferred to CHRIS from the offers stage in Web Recruitment, or
- The recruitment process was unsuccessful and no successful candidates were taken forward from one of the selection stages.

Marking a vacancy as complete will perform a number of actions within the system to benefit departments and Institutions. A vacancy marked as complete will:

- Be purged of applicant identifiable data automatically 12 months after the closing date in accordance with the University’s recruitment document retention policy(unless a the successful applicant required a Tier 2 CoS or the standard

- purging schedule has been overridden with approval from HR);
- Have any successful candidate information saved as a PDF snapshot for future use;
- Not appear in a user's list of vacancies (unless a user actively chooses for complete vacancies to be displayed).

See the guide to Managing Vacancies and Applicants on the [HR Systems pages](#) for more details.