E-Recruitment User Guide:

Hiring Manager – Short-listing
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1. Introduction

When a vacancy is advertised the manager responsible for the vacancy will be expected to select candidates for interview or reject their application based on the joint opinion of a short-listing panel. All officers on the panel will view the submitted application forms and give their opinion as to whether the candidates are suitable to progress to the next stage of the selection process. This approach ensures that there is no individual bias when screening candidates. Where possible, it is recommended that a gender balance is considered when selecting the officers to be involved.

This exercise is based on the Council’s Competency Framework, which is available on [RCT Source](#) under ‘My HR Knowledge Bank’. When a vacancy is advertised the responsible manager will identify up to 6 competency statements from the person specification relating to the post being advertised. Candidates are then expected to provide evidence as to how their experience, qualifications etc meet the competencies identified.

The Council’s online recruitment site is provided by Oleoo and their product is referred to as Oleoo ATS (Applicant Tracking System).

The members of the short-listing panel can view applications by logging-in to Oleoo ATS and use the electronic screening form to give their opinion of each candidate. The manager responsible for the vacancy will then use this information to determine which candidates progress to the next stage of the screening process.

The following pages give a step by step guide in how to screen candidates and subsequently select and reject candidates online using Oleoo ATS.
2. Login to Oleeo ATS and Select your Profile

The link to access Oleeo ATS is available on Inform under ‘Popular Tasks’. Clicking the link on the e-recruitment page will take you to the login screen as described in the previous User Guide (Creating a Vacancy). To view and screen applications at the Short-listing stage you must ensure that you select the ‘Hiring Manager – Shortlisting’ profile. To do so, click on your username in the top left and select ‘Change Profile’ from the menu:

The following screen will display a list of the user profiles available to you. Select the ‘Hiring Manager - Shortlisting’ profile and click the ‘Change Profile’ button to select the appropriate profile:
3. Viewing Applications

To view application forms for a particular vacancy, select ‘Vacancies’ from the left hand menu, click ‘View All Vacancies’ and select the appropriate vacancy from the list. Alternatively, if you have already accessed your vacancy then a shortcut menu will appear that displays a list of recently accessed vacancies. You can also select your vacancy here:

You will then see the vacancy summary screen. The tabs available (Details, Description etc) contain the information completed when the vacancy was created. Click the ‘Applications’ tab to access submitted applications:

Click the link ‘View All Applications’ to access the applications or the link on the next to the appropriate candidate status:
You will then see a list view of all applications that are currently available for screening. It is important to remember that users have access to applications the moment they are submitted – you don’t have to wait until the vacancy closing date has passed to begin screening. This can be particularly useful when a vacancy has a large number of applications:

The view on the above screen can be customised by the user to show a variety of information. Oleeo ATS includes pre-defined views (Public Views) and allows users to create their own (Private Views). The Public Views include 2 that are specific to the screening process:
Application Screening – All Fields: This view shows the maximum of competency statements (6) and maximum of panel members (5).

Application Screening – Comments Only: This view shows a Comments field for the maximum of panel members (5).

The view can be selected by clicking the drop down menu in the middle of the screen and choosing from the available options:

Click the drop down menu to select a view

When you have selected the view you want you can customise it by clicking the icon. This will display a pop up window where you can hide/add/remove the fields that are displayed on the screen:

Hide, move or remove fields from the existing view

Add extra fields from the list
To save the new layout, click the ‘Save Options’ tab and give the new layout a name. This new layout will then be available under ‘Private Views’ as described above:

Select ‘Save Options’ tab to save the new layout

To view a candidate’s application, highlight the candidate you want to view and click ‘View’ or double click on the applicant you want to view:

Highlight the application to be processed and select view or double click
4. Processing and Screening Applications

4.1 Processing Applications

When applications have been submitted the manager who created the vacancy is responsible for moving the candidates through the stages of the workflow (ready for short-listing, selected for interview, rejected after short-listing etc). This can be done by updating the status of candidates individually or in bulk.

To update the status of an individual candidate, view the candidate’s application as described in Section 3. The candidate’s status can be updated by clicking the available button(s) – at this stage of the process there is only one option (ready for short-listing). This task must be completed before panel members can view the applications:

You will now have further options to update the candidate’s application when screening has been completed (i.e. when all panel members have completed the screening process):

Click the ‘ready for shortlisting’ button to update the candidate’s status

Further options to update the candidate’s application are now available – do not select until screening is completed
Alternatively, from the list view highlight all candidates using the button and choose ‘progress application’ from the ‘Status’ menu:

You will be advised of the status you are moving the applications to (in this case ‘ready for short-listing’). Click to complete the task (this may take a few seconds to complete):

The status of all selected applications will now have been updated:
This method is particularly useful when dealing with high numbers of applications. The same action can be performed at later stages of the selection process (‘select for interview’, ‘reject after short-listing’ etc).

4.2 Screening Applications

After updating the status of the applications as described in Section 4.1, follow the process for viewing an application as described in Section 3. You will then be taken to the candidate’s Application Summary. Some data on this screen is anonymised to comply with the Council’s Equal Opportunities Policy. Details of forms completed by the candidate and other members of the short-listing panel can be viewed in the ‘Forms’ tab. The application form completed by the candidate will be available from the link titled ‘General’ or Disclosure, depending on the type of application form chosen for this vacancy. Alternatively, if the candidate applied offline, you can view a PDF of their application form by clicking the link titled ‘Upload Paper Application’:

To view the content of the application form (disclosure or general) click here
When clicking a link to an application form the form content will appear on a tab below the ‘Application’ section (if a candidate has applied offline this is where the PDF of their form will be available):

A new tab will appear containing selective application form details

The new tab will contain all relevant data for short-listing purposes (competency evidence, education history, employment history etc):

Scroll down through form to see all information

Should you wish to view a hard copy of the form click the ‘Print’ button to print a PDF or HTML version of the form (these can also be saved to your pc):
You will then be able to print the format of your choice:

When you have reviewed the candidate’s application you can record your opinions via a screening form. This form allows you to give your opinions as to whether the candidate has provided sufficient evidence that they have met the competency statements and record any other comments that may be useful to the screening panel. To launch the screening form, click the 'Screening Form' button:
The form will contain the competency statements and the responses of the candidate. Select the appropriate rating (met, partially met or not met) from the drop down menu:

On the evidence provided to each competency, select the appropriate ‘Rating’. Repeat for all other competency statements.

The form also contains a comments box that can be used to record information about your opinion of candidate’s application e.g. select for interview, reject candidate or any other relevant details not related to the competency statements (qualifications, experience etc).

When you have completed the form click the Submit button to save the content:
If you have more than one application to screen, you can move to the next candidate by using the < and > buttons on the right and left of the screen:

Alternatively, to return to the list of candidates select from on screen options:

Scroll down and add comments that will assist when viewing screening results in table form.

When complete click ‘Submit’

Click these buttons to move to the next candidate
Depending on the layout you have chosen (as described in Section 3) you can view a layout of your comments and others completed by the short-listing panel:

Both the manager and panel members should continue to login to WCN ATS on a regular basis to screen applications up to the vacancy closing date. The manager responsible for the vacancy will then select or reject candidates based on the comments of the panel.
5. Selecting and Rejecting Candidates

The final step in the screening process is to determine which candidates will be invited to interview and which candidates will be unsuccessful. This can be done for each individual candidate or in bulk (as described in Section 4.1). This should only be completed when the comments of all panel members have been received.

When viewing the list view of candidates, select the view that displays all screening fields or comments (as described in Section 3):

![Select screening view showing all fields](image)

The view will show all the screening information completed by members of the panel (the fields will be updated as panel members complete the screening process):

![As other Panel members complete screening of applications the table will be populated with the results](image)
When all panel members' comments are complete, the content can be exported to excel by selecting the ‘Download Layout’ option. Either select ‘Download All’ or ‘Download Selected Rows’:

You will be asked to confirm the action before the data is exported.

To select/reject an individual application highlight the candidate you want to view and click ‘View’ or double click the applicant you want to view:

Select the appropriate action (most likely to be ‘select for first interview’ or ‘select for rejection’):
To select or reject candidates in bulk, repeat the action as described in Section 4.1. Selecting ‘Progress Application’ will allow you to select candidates for interview; selecting ‘Reject Application’ will select candidates for rejection.

When the candidates’ status has been updated, you will receive a message advising that ‘You do not have access to the applications’. This means the status has been updated and the application is with HR for the candidates to be advised of the outcome of the short-listing process:

The final step is to advise your HR support that you have completed the short-listing process.