





ea Vene User Guide



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Processing Shortlisting Outcomes on the Online Recruitment System

After the shortlisting exercise has been completed, only the 'Shortlisting Final Order of Merit' form should be uploaded to the requisition. The process for uploading the interview document is the same as that of uploading/attaching documents to a requisition which can be found on page 32 of the <u>Creating a Requisition and</u> <u>Requisition Management guide</u>.

Corporate based positions

The following processes for notifying candidates of shortlisting outcomes will be processed by the Corporate Recruiters.

School based positions

The following processes for notifying candidates of shortlisting outcomes will be processed by the School Hiring Manager (Principal)/Hiring Manager Assistant (nominee).

Rejecting a candidate

You will not want to progress candidates who have not met all essential criteria. If you have decided to set and use desirable criteria, you will also want to reject candidates who did not meet the applied desirable criteria.

You can reject a candidate from the main candidate list of the requisition or from their job submission page. The steps remain the same but are completed from different screens.

To reject a candidate from the main candidate list, select the **check box** in the first column. You can select several candidates to reject at one time:

•	i~	⊗ ▲	Candidate	Â	8	*	Step	Selection Step, Status	Essential
	1		Brody, Martin (24644)	^			Shortlisting	Shortlisting - New	0/1

Click More Actions at the top of the page, scroll to and click on Change Step/status:

<u>†</u>	• •<	More Actions 🔻				List For	mat Standard View	•
•	j ~	 Selection Process Revert Latest Change of Step/Status 	Â	P	*	Step	Selection Step, Status	Essential
	i	Change Step/Status	*			Shortlisting	Shortlisting - New	0/1
0	i*	Other Actions Download As Excel	ñ		*	Shortlisting	Shortlisting - New	1/1
	i*	Send Correspondence			*	Shortlisting	Shortlisting - New	1 / 1
	i*	Pona, Amy (24662)				Shortlisting	Shortlisting - New	0 / 1

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To reject a candidate from their job submission page, click **More Actions** at the top of the job submission, scroll to and click on **Change Step/status**.

Summary 📀	Submission: Brody, Martin for Senior	Clerical Officer (ID: 20001093) 🗟
Brody, Martin 💼	🖆 🔀 📑 🛛 More Actions 🔻	
 1 other active submission(s) 	Job Submissie Selection Process Change Step/Status Other Actions	<u>у</u>
Submission General Profile	🔺 Candidat 🐸 Send Correspondence	e
() HIGHLIGHTS (CURRENT SUBMISSION)	Candidate Personal Information	
Essential met Desirable met 0/1 3/4	Internal Candidate Yes	Employee Number 3

The following 'Change Step and Status' pop up is displayed:

Change Step and	Status		×
Candidate Name Brody, Martin		Requisition Title Senior Clerical Officer (20001093)	
	Currently in	Change to	
Step Shortlisting	Status New	→ Status Progress to 1st Stage* ▼ * = completes the step	
Comments			
Please enter comments	; here		
Select Other Action	1		
Send Correspondent	ce		
		Cancel Apply and Continue	Apply and Close



Under the **Change to** heading click to display the status drop down:

	endinge to	
Step	Status	
Shortlisting	Progress to 1st Stage*	•
	Progress to 1st Stage*	^
	DO NOT USE: Rejected - Not Eligible to work in UK	
	Rejected	
	On Hold	
	Candidate Withdrawn	•

Select the **Rejected** status. A **Details or Disposition** box will appear. Select the reason for rejection. These reasons will vary depending on what stage of the process the candidate is at.

Details or Disposition

Does not meet the required criteria for the role

Under the Select Other Action sub heading, Select to Send Correspondence.

Select Other Action

Send Correspondence

Add comments as necessary, however, these comments are not mandatory. Click the **Apply and Proceed to Next Action** button.

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Change to



The 'Send Correspondence' pop up will appear:

You can choose to send correspondence by 'Email' or by 'Printed Letter'. It is recommended that you send correspondence via **Email** as the details of this will then be stored in the candidate history for that role and can be accessed later if necessary.

You can select to write a message from scratch or from a template. Templates have been built for your ease and it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

To use a template, ensure the From Template button is highlighted in blue and click Next.

Send Correspondence				×
Candidate Name Brody, Martin (24644)	Current Step Shortlisting	Current Status Rejected	Requisition Title Senior Clerical Officer	
Send message by:				
Email				
O Printed Letter				
Write a message				
From Scratch From Templat				
			Cancel	

The following pop up will appear:

ide Template List		
	✓ Filters ∨	Not Shortlisted Paragraphs Preview
Showing Templates (5)		Select the paragraphs to include in the message
<u>Not Shortlisted</u> Code: EA_REJECT_SHORTLISTIN G Language: English	5 paragraphs Intended for:: All candidates	EA Reject at Shortlisting Set Sequence (Requisition LocationStructure)
Not Shortlisted - Desirabl used by Corporate) Code:	e used - Met/Not Met (to be	(Requisition Job Title)
EA_REJECT_SHORTLISTIN G_DESIRABLE USED MET.NOT MET Language: English	5 paragraphs Intended for:: All candidates	Thank you for your interest in the above position. We regret to inform you that you have not been shortlisted on this occasion.
Not Shortlisted - Essential by Corporate) Code:	l scored generic (to be used	If you wish to receive notifications on similar opportunities, please sign up to receive job alerts.
EA_REJECT_SHORTLISTIN G_ESSENTIAL SCORED GENERIC Language: English	5 paragraphs	If you require any further assistance or clarification, please email to {Enter email address}.

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Select Template

Cancel



Click on the template you wish to use. You will notice that this will be then be highlighted in a dark shade of blue.

ide Template List		
	✓ Filters ~	Not Shortlisted Paragraphs Preview
Showing Templates (5)		Select the paragraphs to include in the message Select All
<u>Not Shortlisted</u> Code: EA_REJECT_SHORTLISTIN G Language: English		EA Reject at Shortlisting Set Sequence (Requisition LocationStructure)
Not Shortlisted - Desirabl used by Corporate) Code: EA_REJECT_SHORTLISTIN G_DESIRABLE USED MET.NOT MET Language: English	le used - Met/Not Met (to be 5 paragraphs Intended for:: All candidates	{Requisition.JobTitle} Dear {Candidate.FirstName}, Thank you for your interest in the above position. We regret to inform you that you have not been shortlisted on this occasion.
Not Shortlisted - Essentia by Corporate) Code: EA_REJECT_SHORTLISTIN G_ESSENTIAL SCORED GENERIC Language: English	S paragraphs Intended for:: All candidates	If you wish to receive notifications on similar opportunities, please sign up to receive job alerts. If you require any further assistance or clarification, please email to (Enter email address).

Cancel Select Template

You will be now able to review the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required.

Click the **Select template** button and the following pop up will display:

Enter any relevant missing information required to populate on the letter and click **Apply**.

Missing Information	Edit Message	Language: English Preview Edit Message
Enter email address	Please make necessa 1 unresolved tokens • {Enter email ad	y revisions before sending the correspondence were found. dress}
Apply	🔺 Email Header	
	From: * EA Resourcin To: * andrew.henr	g Team <donotreply@eani.org.uk> y@eani.org.uk Cc Bcc</donotreply@eani.org.uk>
	Reply To donotreply@	sani.org.uk
	Subject * Senior Clerica Attachments:	Browse Upload
	Source X h iii iii	nortisted ~] [[] ← → Q, 입 특 프 프 표 표 표 표 표 표 = 제 전 프 및 X
	R 7 II & x. x ^a	I T E⊒ EEE = Styles - Format - Size - A - Kl -
		Cancel Change Template Apply and Continue Apply and Close

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When the missing information has been resolved. You will now be able to preview your letter. Text in curly brackets will now be populated in the correspondence received by the candidate.

If you need to edit a template correspondence, you can do so by clicking on the **Edit Message** at the top of the screen.

Send Correspondence - Preview Message		×
Message Preview	Language: English	Preview Edit Message
No unresolved tokens were found.		
🖌 Email Header		
From: EA Resourcing Team <donotreply@eani.org.v To: andrew.henry@eani.org.uk Cc: andrew.henry@eani.org.uk Reply To donotreply@eani.org.uk Subject Senior Clerical Officer -20001093 Attachments:</donotreply@eani.org.v 	ık>	
Message created from Not Shortlisted		
$\begin{array}{c c c c c c c c c c c c c c c c c c c $	## != := :1E :1E E = = = +1 1 1 (∞ ∞ X Styles - Format - Size - A - Δ -	
Dear Martin. Thank you for your interest in the above position.		
	Cancel Change Template	Apply and Continue Apply and Close

You may wish to add attachments, insert a school logo or edit the email address the correspondence is being issued from.

To insert a school logo, you will need to click **Edit Message** to unlock the edit toolbar.

Click on the Image Icon.



The following pop up will be displayed.



Image Properties		>
Image Info	Link	Advanced
URL Alternative Text		
Width Height Border HSpace VSpace Alignment <pre> Cont set> Y </pre>	Pr Lo el m to to fe ve te to co co cu te Ve	eview prem ipsum dolor sit amet, consectetuer adipiscing it. Maecenas feugiat consequat diam. Maecenas ietus. Vivamus diam purus, cursus a, commodo on, facilisis vitae, nulla. Aenean dictum lacinia rtor. Nunc iaculis, nibh non iaculis aliquam, orci lis euismod neque, sed ornare massa mauris sed elit. Nulla pretium mi et risus. Fusce mi pede, empor id, cursus ac, ullamcorper nec, enim. Sed rtor. Curabitur molestie. Duis velit augue, pondimentum at, ultrices a, luctus ut, orci. Donec ellentesque egestas eros. Integer cursus, augue in ursus faucibus, eros pede bibendum sem, in empus tellus justo quis ligula. Etiam eget tortor. estibulum rutrum est ut placerat elementum lectus

You will then need to locate the school logo from your school website. Right click on the image, and then click on **copy image address**. Paste the image address into the **URL** field.

Click **OK** and the school logo will appear in your message template.

You may wish to remove the EA Logo.

Please note that the default email address is the **EA Resourcing Team**.

To issue this correspondence, click **Apply and Close.**

You will receive the following message;





Rejecting candidates in bulk

Alternatively, you can choose to reject multiple candidates. To perform this action, you will need to do this from the submissions list and the candidates that you have selected must be in the same step and status, for example, **shortlisting step and status - new**. Select the **check box** in the first column for those candidates that you are rejecting.

Click **More Actions** at the top of the page, from the drop down menu, click on **Change Step/status.**

1	\sim									
(- ~	i~	\otimes	Candidate	Â	P	*	Step	Selection Step, Status	Essential 🔺
		~		Brody, Martin (24644)	*			Shortlisting	Shortlisting - New	0/1
$\left(\right)$		/i ~		Pond, Amy (24662)				Shortlisting	Shortlisting - New	0/1

As outlined previously, select the reason for rejection. An **additional Details or Dispositions** box will appear. Select the reason for rejection. These reasons will vary depending on what stage of the process the candidate is at.

Under the Select Other Action sub heading, Select to Send Correspondence. Click Apply and Proceed to Next Action.

You can choose to send correspondence by 'Email' or by 'Printed Letter'. It is recommended that you send correspondence via **Email** as the details of this will then be stored in the candidate history for that role and can be accessed later.

You can select to write a message from scratch or from a template. Templates have been built for your ease and it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

To use a template, ensure the **From Template** button is highlighted in blue and click **Next**.

The send correspondence pop up is displayed with a selection of template letters. Click on the template you wish to use.

As before, you will be now able to preview the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required.

Click on the **Select Template** button at the bottom of the page.

Review the template and should you wish to make any amendments, these will need to be done at this point.



Bulk Action	- Send Correspondence to 2 Submissions - Preview Message	:
dit Message	Language: English	
📕 Email Head	ler	Ľ
From: *	EA Resourcing Team <donotreply@eani.org.uk></donotreply@eani.org.uk>	
To: *	{CandidateHeader.Email} Cc Bcc	
Reply To	donotreply@eani.org.uk	
Subject *	{Requisition.JobTitle} -{RequisitionHeader.ContestNumber}	
Attachments:	Browse Upload	
lessage creat		
B I U	S 10 10 10 10 1	
{Other.Comp	anyLogos1}	
(Requisition.)		-
	Cancel Change Template Apply and Continue Apply and Close	e

Click Apply and Close.

A send correspondence pop up will be displayed and this will highlight any errors or missing information which need to be completed on your template letters. Click **Review All.**

Bulk Action - Send Correspondence ×
! Warning
2 of 2 submissions contains errors and will not be sent. Would you like to continue?
Cancel Review All

The names of the candidates that you have selected to send correspondence to in bulk will now appear on the left side of the screen.

There are 2 submis	sions containing e	errors (2 in total)	
lide selected submission:	s	Please resolve following subm	ission errors
Submissions	Sort by \sim	Amy Pond ID:31122	✓ Validate 🗧 🗧
Amy Pond ID 31122 Language English	1 Errors	Missing Information	Edit Message Language: English Preview Edit Message
Martin Brody ID 31123 Language English	1 Errors	Enter email address	Please make necessary revisions before sending the correspondence unresolved tokens were found. (forer small address)
\mathbf{X}		Apply	∡ Email Header
			From: * EA Resourcing Team <donotreply@eani.org.uk< td=""></donotreply@eani.org.uk<>
			To: * To: C Bcc
			Reply To donotreply@eani.org.uk
			Subject * Senior Clerical Officer -20001093

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You will notice that there are a number of errors against each candidate that need to be resolved.

These errors can be resolved by completing the missing information tab. Complete with the required information and click the **Apply** button.

This information has now been populated on the first candidate correspondence; you will notice that there is now a tick beside the candidate name to confirm that all errors have been resolved.



To resolve the errors on the remaining candidates, click on their name, they will now highlighted in a dark shade of blue. Click **Apply** to complete the required information. You will need to continue with this process for all candidate that you have selected.

To preview each correspondence you can do this by clicking on the candidate's name.

le selected submissior	ıs		
ubmissions	Sort by ~	Martin Brody ID:31123	>
Amy Pond ID 31122 Language English	۲	Message Preview Language: English Preview Edit Message	je Î
Martin Brody ID 31123 Language English	٢	Ready to send Fmail Header	d
		From: EA Resourcing Team <donotreply@eani.org.uk> To: andrew.henry@eani.org.uk Cc: andrew.henry@eani.org.uk ReplyTo donotreply@eani.org.uk Subject Senior Clerical Officer -20001093 Attachments:</donotreply@eani.org.uk>	ļ
		Message created from Not Shortlisted	

Click the **Apply and Close** button to issue the correspondence.

Note the number in brackets in the **Apply and Close** button, this highlights the total number of correspondence being issued.

The following message will display;



To view the correspondence that you have just sent, click on the candidate name to access their profile and select the **History** tab.



Submission: Po	nd, Amy for Senior Clerical Officer (ID: 20001093) 🗔	
More Act	ions 🔻		
Job Submission	Interviews History		
	Show history for	Current submission - Senior Clerical Officer (🔹	
Modify Categories	8 out of 11 event categories selec	cted	Sort By 👻
▲ Senior Cleri	cal Officer (ID: 20001093)		
Date	Events	Details/Comments	Ву
29-Jul-2020, 3:11:	41 PM Correspondence sent	Senior Clerical Officer -20001093 🔂	Hiring Manager (Hiring Manager)

The candidate history has been logged. Click on the blue hyperlink under the **Details/Comments** column to view correspondence received by the candidate.

Correspondence Preview	×
Vea Education Authority	
Northern Ireland>Down>Dundonald>Dundonald Office	
Senior Clerical Officer	
Dear Amy,	
Thank you for your interest in the above position.	
We regret to inform you that you have not been shortlisted on this occasion.	
If you wish to receive notifications on similar opportunities, please sign up to receive job alerts.	
If you require any further assistance or clarification, please email to ea@recruitment.org.uk.	
Yours sincerely	
EA Corporate Resourcing Team	
Do not reply to this email as this is an automated notification.	
Please note that you can update your account preferences at anytime by accessing the My Account page.	
	- V
Clos	se

You will notice that the fields previously in curly brackets were populated in the correspondence received by the candidate.

When you are finished, click the **Close** button.



Progressing a candidate

You will want to progress candidates who have met all essential criteria and any desirable criteria that you have set and applied.

You can progress a candidate from the main candidate list of the requisition or from within their job submission page. The steps remain the same but are completed from different screens.

Tip: You can choose to schedule interviews/assessments either:

- <u>One by one</u> by selecting only one candidate at a time
- In bulk by selecting all candidates you are inviting to interview per interview date
- In bulk by selecting all candidates you are inviting to interview in total

If you select more than one candidate at a time to schedule an interview for, you <u>must</u> edit the invite letter for each candidate to update the date/time. This will be shown later in this user guide.

To progress a single candidate from the main candidate list select the **check box** in the first column next to the candidate you want to progress. You can select to progress multiple candidates at once.

Click More Actions, scroll to and click on Change Step/status:

•	j~	⊗	Candidate	ñ	P	*	Step	Selection Step, Status	Essential
			Carter, Peggy (24664)	*		*	Shortlisting	Shortlisting - New	1/1
	i ~		Danvers, Carol (24629)			*	Shortlisting	Shortlisting - New	1 / 1
	i ~		Pond, Amy (24662)				Shortlisting	Shortlisting - Rejected	0 / 1
	i*		Brody, Martin (24644)	ñ			Shortlisting	Shortlisting - Rejected	0 / 1

To progress a candidate from the job submission page, click **More Actions** at the top of the candidate job submission, scroll to and click on **Change Step/status**.

NB: Should you progress a candidate from their job submission page, you can only progress one candidate at a time as opposed to completing this task for several candidates at once.





The following 'Change Step and Status' pop up is displayed:

Change Step and	Status		×
Candidate Name Carter, Peggy			Requisition Title Senior Clerical Officer (20001093)
	Currently in		Change to
Step Shortlisting	Status New	Step Shortlisting	Status Progress to 1st Stage* *= completes the step
Comments Please enter comments	s here		
Select Other Action Send Corresponden	1 Ice		
			Cancel Apply and Continue Apply and Close

Click to display the drop down on the **Change to** status heading.



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Ensure **Progress to 1**st **Stage**^{*} is selected and click **Apply and Continue**. This will move the candidate to the next step of the workflow – **Stage 1 Interview/Assessment.**

The 'Change Step and Status' pop up page will reflect this new step and will have options for the New Status of the candidates:

Change Step an	id Status		×
Candidate Name Carter, Peggy		Requisition Title Senior Clerical Officer (20001093)	
	Currently in	Change to	
Step Shortlisting Comments Please enter comme	Status Progress to 1st Stage	Step Status To be Scheduled To be Scheduled Scheduled On Hold Progress to Pre-employmer Checks*	ν 1t
Select Other Acti	ion lence	Cancel Apply and Continue	Apply and Close

To schedule your interviews later, select **To be Scheduled** and click **Apply and Close**.

You will be returned to the requisition candidate list were you will notice that the candidates have been updated to the new step and status:

Alternatively, if you wish to proceed to schedule your interviews select **Scheduled** on the New Status list:

Under the Select Other Action sub heading, tick the checkbox to Send Correspondence:

Click Apply	/ and	Proceed	to	Next Action	button.
-------------	-------	---------	----	--------------------	---------

Change Step ar	nd Status	
Candidate Name Carter, Peggy		Requisition Title Senior Clerical Officer (20001093)
	Currently in	Change to
Step Shortlisting	Status Progress to 1st Stage	Step Stage 1 Interview / Assessment
Comments Please enter comm	ents here	
Select Other Act	ion dence	
		Cancel Apply and Proceed to Next Action

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The 'Send Correspondence' pop up will display. You can choose to send correspondence by Email or by Printed Letter by changing the drop down value in the first field. It is recommended that you send correspondence via **Email** as the details of this will then be stored in the candidate history for that role and can be accessed later if necessary.

You can create an Invite to Interview/Assessment from scratch or from a template. Templates have been built for your ease and it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

To use a template, ensure the **From Template** button is highlighted in blue and click **Next.**

Send Correspondence	e			×
Candidate Name Carter, Peggy (24664)	Current Step Stage 1 Interview / Assessment	Current Status Scheduled	Requisition Title Senior Clerical Officer	
Send message by:				
Email				- 1
O Printed Letter				
Write a message	nplate			
			Cancel	>

The following pop up will appear:

ide Template List			
✓ Filters ∨			Invite to interview_Covid_Face to Paragraphs Preview Face_ID required (to be used by corporate) Preview
Invite to interview Covid be used by corporate) Code: INV TO	Face to Face_ID required (to	*	Select the paragraphs to include in the message
INTERVIEW_COVID_FACE TO FACE_ID REQ_CORP Language: English	5 paragraphs Intended for:: All candidates		Invite to Interview_Covid_Face to Face_ID Required Set Sequence
Invite to interview_Covid_ be used by schools) Code: INV TO INTERVIEW_COVID_FACE TO FACE ID	Face to Face_ID required (to		(Requisition.LocationStructure} (Requisition.JobTitle) Dear {Candidate.FirstName}
REQ_SCHOOLS Language: English	5 paragraphs Intended for:: All candidates		As you may be aware our recruitment processes have been suspended for several weeks following the outbreak of the COVID-19 Pandemic.
Invite to interview_Covid_ required (to be used by c Code: INV TO INTERVIEW_COVID_FACE	Face to Face_No ID orporate)		We are now in a position to progress this recruitment exercise and wish to invite you to attend a face to face interview (with social distancing measures) as detailed below: Interview Date: {Enter date of interview}
TO FACE_NO ID_CORP Language: English	5 paragraphs Intended for:: All candidates	•	Interview Time: {Enter interview time}

The 'Template Selector' pop up will appear. Click on the template you wish to use, you will notice that this will be highlighted in a dark shade of blue.



You will be now able to preview the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required by clicking the checkbox next to the paragraph title.

You can use the filters to assist you with your search.

Hide Template List						
Showing	Location	Invite to interview Covid, Face to Parographs Preview Face_ID required (to be used by corporate)				
Invite to in be used b	 Job Field 	Select the paragraphs to include in the message				
NTERVIEW	Confidential	Invite to interview_Covid_Face to Face_ID Required Set Sequence				
nvite to li le used b	Read-only attachment Intended for-	(Requisition LocationStructure) (Requisition JobTitle)				
ODE: INV	All candidates 🛛 👻	Dear {Candidate FirstName}				
EQ_SCHC anguage:	Keyword	As you may be aware our recruitment processes have been suspended for several weeks following the outbreak of the COVID-19 Pandemic.				
vite to in equired (Name or Code	We are now in a position to progress this recruitment exercise and wish to invite you to attend a face to face interview (with social distancing measures) as detailed below:				
NTERVIEW	Apply Filters Clear All	Interview Date: (Enter date of interview)				
anguage.		Interview Time: (Enter interview time)				

Click the **select template** button to continue.

A warning message will now be displayed to advise that there is missing information that needs to be completed on the interview letters. This missing information will be the actual interview details. Enter this information on the missing information pane and click **Apply** beneath the missing information fields to update the template.

	Edia Massanai		
Missing Information	Edit Message	Language: English	Preview Edit Message
Enter date of interview Enter interview time	Please make necessary n 7 unresolved tokens we Enter date of inter Finter interview tin Email Header	evisions before sending the correspondence re found. rview} me1	NB: Should you wish to edit the template, click on the Edit Message button.
Enter interview location Enter where you would like your candidate to wait until they are collected by a member of the selection panel NB: Please note that th	From: * EA Resourcing Te To: * bronagh.turner@ Reply To donotreply@ean Subject * Update on your a Attachments: e default	eam <donotreply@eani.org.uk> Deani.org.uk Cc Bcc i.org.uk application for Senior Clerical Officer -20001093 Br</donotreply@eani.org.uk>	You may wish to add attachments, insert a school logo or edit the email address the correspondence is being issued from.
email address is "FA Re		o interview_Covid_Face to Face_ID required (to b	be used by corporate) *
			± ± ≡ •¶ ¶• ∞ ∞ X
leam"	× × × ×	T. E = Styles + Format	- Size - A - A -

Review the template letter to ensure the text previously in curly brackets has now been populated with the information you provided. Click **Apply and Close** to issue the correspondence.



Sending Interview correspondence to more than one candidate at a time to interview/assessment stage

If you are selecting several candidates to invite to interview at one time. From the submission list, Select the **check box** in the first column for those candidates that you are inviting to interview.

•	j~	⊗	Candidate	ñ	P	*	Step	Selection Step, Status	Essential
	1		Carter, Peggy (24664)	*		*	Shortlisting	Shortlisting - New	1/1
	1		Danvers, Carol (24629)			*	Shortlisting	Shortlisting - New	1/1

Click **More Actions,** from the drop down, click on **Change Step/status:**

1 t	Submis	sions for: Senior Clerical Officer (Requisitio	n ID: 20001	093) 🔂				
FILTER:	s> No filte	ers are applied						
ii 🛛	≤ -	More Actions 🔻				List Format	Standard View	•
•	j~	Selection Process	Â	P	*	Step Sele	ection Step, Status	Essential
	i n	Change Step/Status	ñ		*	Shortlisting She	ortlisting - New	1/1
	i*	Other Actions Download As Excel				Shortlisting Sh	ortlisting - New	171
	i	Send Correspondence				Shortlisting Sho	ortlisting - Rejected	0 / 1
0	i~	ьгоау, магип (24644)	â			Shortlisting Sho	ortlisting - Rejected	0 / 1

Click to display the drop down on the change to Status heading.

Bulk Action - Char	nge Step and Status			
You are performing this	action on 2 submissions. Currently in			Change to
Step Shortlisting	Status New	+	Step Shortlisting	Status Progress to 1st Stage*
Comments				DO NOT USE: Rejected - Not Eligible to work in UK
Please enter comments	here			Rejected On Hold
Select Other Action				Candidate Withdrawn 👻
Send Correspondent	ce			
				Cancel Apply and Continue Apply and Close

Ensure **Progress to 1**st **Stage* is** selected and click **Apply and Continue**. This will move the candidate to the next step of the workflow – **Stage 1 Interview/Assessment.**



The pop up will reflect this new step and will have options for the New Status

Bulk Action - Chan	ge Step and Status			×
You are performing this	action on 2 submissions. C urrently in		Change	to
Step Shortlisting	Status Progress to 1st Stage	→	Step Stage 1 Interview / Assessment *	Status To be Scheduled To be Scheduled
Comments Please enter comments	here			Scheduled vidually) On Hold Progress to Pre-employment Checks* Progress to 2nd Stage*
Select Other Action Send Correspondence	e		Can	cel Apply and Continue Apply and Close

To schedule your interviews later, select **To be Scheduled** and click **Apply and Close**.

Alternatively, if you wish to proceed to schedule your interviews select **Scheduled** on the New Status list.

Under the **Select Other Action** sub heading, tick the checkbox to **Send Correspondence**:

Bulk Action - Cl	hange Step and Status				:
You are performing	this action on 2 submissions. Currently in			Change to	
Step Shortlisting	Status Progress to 1st Stage	+	Step Stage 1 Interview / Assessment 🔻	Status Scheduled * = completes the step	•
Comments Please enter comme	ents here			(Applies to all submissions i	individually)
Select Other Act	ion				
				Cancel Apply and Proceed to N	ext Action

Click Apply and Proceed to Next Action button.



The 'Send Correspondence' pop up is displayed. You can choose to send correspondence by Email or by Printed Letter. It is recommended that you send correspondence by Email. Candidates have been advised that on completion of their application, all correspondence relating to their application will be sent via the email address they provided.

Bulk Action - Send Correspondence		×
You are performing this action on 2 submission(s)		
Send message by:		
O Email		
O Printed Letter		
Write a message From Scrath From Template		
	Cancel	Next

You can create an Invite to **Interview or Assessment** from scratch or from a template. Templates have been created in the system library for your ease; it is recommended that you use these to help provide consistency. Different templates will be available depending on what stage of the process you are at.

To access the library templates, click on the **templates** button and then click **next**.

The 'Template Selector' pop up will appear. Click on the template you wish to use, you will notice that this will be highlighted in a dark shade of blue.

You will be now able to preview the template paragraphs to ensure that you are selecting the correct template. Text in **curly brackets** will be populated in the actual correspondence received by the candidate.

ide Template List		
✓ Filters ∨ Showing Templates (16)		Invite to interview_Covid_Face to Face_ID required (to be used by corporate)
Invite to interview Covid I be used by corporate) Code: INV TO INTERVIEW_COVID_FACE TO FACE_ID REQ_CORP Language: English	Face to Face ID required (to 5 paragraphs Intended for:: All candidates	Select the paragraphs to include in the message Select All
Invite to interview_Covid_ be used by schools) Code: INV TO INTERVIEW_COVID_FACE TO FACE_ID REQ_SCHOOLS Language: English	Face to Face_ID required (to 5 paragraphs Intended for:: All candidates	(Requisition LocationStructure) (Requisition.JobTitle) Dear (Candidate.FirstName) As you may be aware our recruitment processes have been suspended for several weeks following the outbreak of the COVID-19 Pandemic.
Invite to interview_Covid_ required (to be used by co Code: INV TO INTERVIEW_COVID_FACE TO FACE_NO ID_CORP Language: English	Face to Face_No ID prporate) 5 paragraphs Intended for:: All candidates	We are now in a position to progress this recruitment exercise and wish to invite you to attend a face to face interview (with social distancing measures) as detailed below: Interview Date: [Enter date of interview] Interview Time: (Enter interview time)



All paragraphs are selected by default; however, you can remove paragraphs from your correspondence if they are not required by clicking the checkbox next to the paragraph title. You can use the filters to assist you with your search.

Templa	ate List			
iowing	Location	✓ Filters ∧	Invite to interview_Covid_Face to Face_ID required (to be used by corporate)	Paragraphs Preview
ite to ii used b	▶ Job Field		Select the paragraphs to include in the message	🛛 Select All
ERVIEW FACE_II guage: ite to ii	Confidential Read-only attachment		Invite to interview_Covid_Face to Face_ID Required (Requisition LocationStructure) (Requisition.JobTitle)	Set Sequence 1
le: INV ERVIEW FACE_II	Intended for: All candidates	*	Dear {Candidate.FirstName}	
)_SCHC iguage:	Keyword		As you may be aware our recruitment processes have been suspe outbreak of the COVID-19 Pandemic.	nded for several weeks following the
ite to il luired (de: INV			We are now in a position to progress this recruitment exercise and interview (with social distancing measures) as detailed below:	wish to invite you to attend a face to face
FACE_N	Apply Filters Clear All		Interview Date: {Enter date of interview}	

Click the **select template** button to continue.

The template will now open in an editable format. Make amendments if necessary.

🔺 Email Head	ler		
From: *	EA Resourcing Team <donotreply@eani.org.uk></donotreply@eani.org.uk>		NB: You may wish to add
то: *	{CandidateHeadet Email}	Cc Bcc	attachments, insert a school
Reply To	donotreply@eani.orguk		logo or edit the email address
Subject *	Update on your application for {Requisition.JobTitle} -{RequisitionHeader.ContestNumber}		the correspondence is being
Attachments:		Browse Upload	issued from.
	NB: Please note that the default		
Message creat	email address is "EA Resourcing	5.00	
B T U		9	
We are now in Interview Da	n a position to progress this recruitment exercise and wish to invite you to attend a face to face interview te: {Enter date of interview} ne: {Enter interview time}	v (with social distancing measures) a	s detailed below:
	Cancel	Change Template Apply an	d Continue Apply and Close

When you are ready to proceed, click on the **Apply and Continue** button to continue.

A warning pop up will now be displayed to advise that there are errors on the submission. This is referring missing information that needs to be completed on the interview letters. This missing information will be the actual interview details. To input this information, click **Review all.**



Bulk Action - Send Correspondence	×
🕂 Warning	
2 of 2 submissions contains errors and will not be sent. Would you like to continu	ie?
Cancel Review Al	

The next page within the pop up enables you to complete the missing information and tailor the correspondence for each candidate. These missing information fields may vary depending on the correspondence template you have selected to use.

Enter the interview details within the **missing information** pane.

hide selected submissio	ns	Please resolve following submission	errors		
Submissions	Sort by	Peggy Carter ID:31120			✓ Validate 🔨
Peggy Carter ID 31120 Language English	7 Errors	Missing Information	Edit Message	Language: English	Preview Edit Message
Carol Danvers ID 31124 Language English	7 Errors	Enter date of interview Enter interview time	Please m. correspon 7 unreso	ake necessary revisions bef ndence Ived tokens were found.	ore sending the
			🔺 Email Heade	er	
		Enter interview location	From: *	EA Resourcing Team <donotre< td=""><td>ply@eani.org.uk</td></donotre<>	ply@eani.org.uk
		Enter where you would like your candidate	то: *	bronagh.turner@eani.org.uk	
	\ \	to wait until they are collected by a member of the selection panel	Reply To	donotreply@eani.org.uk	
			Subject *	Update on your application fo	Senior Clerical

If you have selected multiple candidates to **invite to interview**, enter the interviewdetails for the first candidate, only leaving out the **interview time** field. You can update each candidate's interview time before sending the invite. This action will populate the information on all candidate invites and ensure you do not invite candidates to attend for interview at the same time.

When you have completed the missing information fields, click **Apply**.

Peggy Carter ID:31120
Enter contact name
Andrew Henry
Enter contact telephone number
12345678
Enter contact email address
easchool@online.com
Apply

The missing information that you have entered will now be displayed in the correspondence for your review.

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Click on the next candidate and you will notice that the missing information fields will be populated with the information that you entered for the 1st candidate. To apply this information to the template, click the **apply** button. Continue this action for all candidates on your list.

You will now notice that each candidate will have one error on their template.

Su	bmissions	Sort by \sim
0	Peggy Carter ID 31120 Language English	1 Errors
8	<u>Carol Danvers</u> ID 31124 Language English	1 Errors

This will be the **interview time**. To populate this information for each candidate, click on the candidate name and enter the interview time that corresponds with your interview schedule. Click **Apply** to add this missing information to each of your candidates invite to interview letter.

If you need to edit a candidates correspondence, click on candidate name and then click the **Edit Message** button on the top right of the pop up. The correspondence will then open in an editable format. You will now be able to make amendments.

However, please note that this will only edit individual letters and if amendments are applicable to each candidate, this action will need to be repeated for all candidate correspondence.

Ensure that there are no errors on the correspondence as this may prevent your correspondence from saving or sending.

To preview each candidate correspondence before sending, click on each candidate's name, it will be highlighted in a dark shade of blue.

ide selected submission	ns	
Submissions	Sort by \sim	Carol Danvers ID:31124
Peggy Carter ID 31120 Language English	٢	Message Preview Language: English Preview Edit Message
Carol Danvers ID 31124 Language English	0	Ready to send
		From: EA Resourcing Team <donotreply@eani.org.uk> To: brongh.turner@eani.org.uk Cc: bronagh.turner@eani.org.uk Reply To donotreply@eani.org.uk Subject Update on your application for Senior Clerical Officer -20001093 Attachments:</donotreply@eani.org.uk>
		Message created from Invite to Interview_Covid_Face to Face_ID required (to be used by corporate) Description Source X 집 급 급 (속 수 Q 는 등 특 [그 그 후 후] 는 호 로 들 또 또 후 후] 프 및 25

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Click **Apply and Close.** If you are sending more than one invite to interview correspondence, you will notice that there will be a number identifying the total correspondence you are about to issue in brackets on this button.

The following message will appear;



You will be returned to the requisition candidate list were you will notice that the **candidates Step and Status** has been updated to **Stage 1 interview/Assessment – Scheduled:**

0	j~	Carter, Peggy (24664)	ñ	★ Stage 1 Stage 1 Interview / Interview / Assessment - Scheduled 1 / 1
0	i ~	Danvers, Carol (24629)		Stage 1 Stage 1 Interview / ★ Interview / Assessment - Scheduled 1 / 1

To view the correspondence that you have just sent, click on the candidate name to access their profile:

You are here > > Requisition List > Submissio	n List > Candidate View		Back to Sub	mission List
Summary 📀	Submission: Carter, Pe	ggy for Senior Clerical Officer (ID: 2	20001093) 🖟	
Carter, Peggy 🏥	🏥 🚬 🖶 More Action	as 💌		
* 🖬 🏶 🌡	Job Submission Inte	erviews History		
• 1 other active submission(s)		Show history for Cur	rrent submission - Senior Clerical Officer (🔻	
Submission General Profile General Profile HIGHLIGHTS (CURRENT SUBMISSION)	Modify Categories 8 OU	t of 11 event categories selected		Sort By 👻
Essential met Desirable met	▲ Senior Clerical Offic	cer (ID: 20001093)		
Step: Stage 1 Interview / Assessment	Date	Events	Details/Comments	Ву
Status: Scheduled Source: Career Section Date of Application:21-Jul-2020	30-Jul-2020, 12:26:18 PM	Correspondence sent	Update on your application for Senior Clerical Officer -20001093 (2	Hiring Manager (Hiring Manager)

From this screen, select the **History** tab. This will display all system history for this candidate. Links in blue are hyperlinks which, when clicked, enable you to view correspondences as received by the candidate:



Correspondence Preview	×
Message	*
Northern Ireland>Down>Dundonald>Dundonald Office Senior Clerical Officer	
Dear Peggy	
As you may be aware our recruitment processes have been suspended for several weeks following the outbreak of the COVID-19 Pandemic.	I
We are now in a position to progress this recruitment exercise and wish to invite you to attend a face to face interview (with social distancing measures) as detailed below:	ł
Interview Date: 30/07/2020	
Interview Time: 9:00	
Location: Dundonald	
Please note that the reception desks in our buildings are not operating at this time. On arrival please wait Reception where you will be collected by a member of the selection panel.	
Please be assured that your face to face interview will be conducted in line with the current <u>public health advice</u> . Under careful consideration for the progression of this contact-free interview, the meeting will be conducted as follows:	
- The Interview attine will allow at Ineet 7m diatanan kukwan awanana	*
Close	

When you are finished with this pop up. Click the **Close** button.

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Inviting a candidate to a further interview/assessment

The action taken to progress a candidate to another interview/assessment is predominantly the same as detailed above. The main difference is the different step and status you will use.

Select the relevant candidate(s), click **More Actions** and select **Change Step/status**:

in i	Carter, Peggy (24664)	*	*	Stage 1 Interview / Assessment	Stage 1 Interview / Assessment - Scheduled	1/1
ie.	Danvers, Carol (24629)		*	Stage 1 Interview / Assessment	Stage 1 Interview / Assessment - Scheduled	171

The 'Change Step and Status' pop up will be displayed. Ensure that the Change To Status is updated to Progress to 2nd Stage and click Apply and Continue:

	Bulk Action - Change Step and	Status				×
	You are performing this action on 2 submissions . Currently in				Change to	
	Step Stage 1 Interview / Assessment	Status Scheduled	+	Step Stage 1 Interview / Assessment	Progress to 2nd Stage*	
NB: Status with an asterisks at the end indicated that this is the end					Rejected Reserve Candidate Withdrawn Position Withdrawn)
move the candid step in the proce	ate to the next ss.				Cancel Apply and Continue Apply and Close	

You will now land on a new step, 'Stage 2 Interview/Assessment'. Ensure that the new status is updated to **Scheduled** and tick the check box under **Select Other Action** to **Send Correspondence**.

3ulk Action - Change Step and Status ×								
You are performing this action on 2 submissions. Currently in			Change to					
Step Stage 1 Interview / Assessment	Status Progress to 2nd Stage	→	Step Stage 2 Interview / Assessment		Status Scheduled * completes the step			
Comments Please enter comments here					(Applies to all submissions indivi	idually)		
Select Other Action								
					Cancel Apply and Proceed to Next A	lction		

Repeat the same steps outlined before to issue the invite to interview/assessment to your selected candidate(s).



Copy the steps from before to schedule a third interview/assessment. This can only be completed if the 'Detailed Candidate Selection Workflow' was selected on the initial requisition prior to advertisement. Again, the main difference is the step and status you will use. You will need to select **Progress to 3rd stage** to land on the 'Stage 3 Interview/Assessment' step and from there you can schedule a further interview, issuing correspondence as outline above.

Reverting the Step/Status of a candidate

If you have accidentally moved a candidate to the wrong Step or Status, you will want to revert this action. To do this, select the candidate that has been moved in error, click **More Actions** and select the **Revert latest change to step/status** from the drop down menu:

ii 🛛	• • (More Actions 🔻	List Format Standard View					
•	i ~	Selection Process Revert Latest Change of Step/Status	Â	P	*	Step	Selection Step, Status	Essential
		🖆 Change Step/Status				Shortlisting	Shortlisting - Rejected	0/1
0	i*	Other Actions Download As Excel	Â			Shortlisting	Shortlisting - Rejected	0 / 1
	i ~	Send Correspondence			*	Stage 1 Interview / Assessment	Stage 1 Interview / Assessment - Progress to 2nd Stage	1/1
		·/				Stage 1	Stage 1 Interview /	

The 'Revert the latest change of step/status' pop up appears:

Revert Latest Change of Step/Status										
Candidate Name Pond, Amy(24662)			Requisition Title Senior Clerical Officer							
	_	Currently in								
Step Shortlisting	Status New	+	Step Shortlisting	Status Rejected						
Comments *										
Rejected in error.					li.					
			Cancel	evert and Close Revert and C	ontinue					

Provide a reason for reverting the action in the comments box and click **Revert and Close.** If you need to revert a candidate by more than one Step/Status at a time, click **Revert and Continue** instead.

If you click **Revert and Continue** and there is a further Step/Status to revert, the system will now display this in the pop up. Follow the same process of providing relevant details in the comments box and click either of the Revert buttons.



If you have clicked **Revert and Continue** in error instead of **Revert and Close**, simply click the **Cancel** button to leave the pop up and no further action will be taken.

Tip: If you have reverted a step/status that originally issued correspondence to a candidate, you may need to take corrective action.

For example, if you moved a candidate to 'Rejected' in error and have issued correspondence to the candidate informing them of this, you will need to follow up with the candidate and advise them of the error.

Key point

It is recommended that all candidate correspondence is issued via the online recruitment system and not from users work or personal email address so that it can be tracked in the History tab and can be accessed or relied on at a later date if necessary.