Online Recruiting

Advertised Vacancies and Direct-to-Offer fact sheet

Hiring Manager Process Guide

UNIVERSITY of OTAGO
Te Whare Wānanga o Otāgo
NEW ZEALAND

Updated 01 Sept 2021, Version 1.2 by Megan Murray, Sue Anderton and Toni Iaseto

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Red Section: Process Guide

Getting Started

I have a vacancy to fill. How do I do that?

The recruiting process at the University can be broken down into eight distinct stages. As you can see, the process has support from Human Resources throughout.

From creating the initial requisition to viewing and managing candidates online and even submitting the details of the offer - the process is designed to be streamlined and user friendly.

Please remember that, in addition to this printed material, there are also a host of resources available online within the Human Resources Tool Kit: https://www.otago.ac.nz/humanresources/toolkit/

Is there any process / system specific language I should know?

Any system or process will come complete with new language to describe it and the recruiting process is no exception. Below is some of the language you may see or hear throughout the recruiting process.

Term	Definition
Candidate Selection Workflow (CSW)	The method of moving candidates through the stages of the recruitment process e.g. to be reviewed, short listed, interviewed, rejected, offered.
Collaborator	Any staff member who requires access to the vacancy and candidates. For example, selection panel members and approvers.
Direct to Offer	Where an offer is to be made to a specific individual, without advertising through our recruitment system.
eShare	A tool enabling approvers to quickly review information, any relevant documentation and approve online.
Hiring Manager	The decision maker for the vacancy, normally the Chair of the selection panel.
Hiring Manager's Assistant	A staff member who is providing administrative support to the Hiring Manager.
Job Family	The type of position available, for example Academic-Research-Postdoctoral Fellow.
Job Submission	The candidate's online application.
Offer Grid	The form within the recruitment system which includes all information about the offer.
Pre-Screening Question	Selection questions, which candidates complete during their application. They are specific to the vacancy requirements and assist in short listing.
Recruiter	The member of the Human Resources team who is providing support to the vacancy.
Requisition	The form within the recruitment system which includes all information about the vacancy.
Requisition Owner	The staff responsible for managing and administering the recruitment process (Recruiter, Hiring Manager, Recruiter's Assistant and Hiring Manager's Assistant).

How do I log in?

The recruiting system uses your University username and password. That is the same username and password you use to sign on to your computer or to access your email.

If in doubt, it should look similar to this: bonja07p

For more information on the university username:
https://www.otago.ac.nz/its/services/help/otago022891.html

Reference: Blue pg 1

I've never used the recruiting system before. What should I know about navigating the software?

The recruiting system is very powerful and also extremely user friendly. If you have spent time on the internet, the intuitive layout will quickly become second nature for you. That said there are some things you should remember.

1. Avoid your browser buttons

Back. Forward. Refresh. It can be very difficult to overcome this habit. The software runs inside your web browser so using the Back button may almost be a reflex. Unfortunately, you can sometimes accidentally lose data if you use the browsers navigation buttons - and that will mean re-entry. There is always a way to navigate within the application, so take some time to get familiar with the navigation tools.

2. Single click

Items within the online recruiting application will only ever need a single click.

3. List → individual views → tabbed information

Whether looking at candidates or requisitions, you will always first access a list view and then have the option to view individuals as required. Within individual records, information will be tabbed to give you access to just the information you need.

4. Left and right panels

The right-hand panel contains help and support information that you can access at any time. The left-hand panel will hold either additional summary information or filters to help you find what you are looking for.

5. Candidate Files

By default, when you view candidate details you will see the candidates submission for your vacancy. Be aware you can also view the candidate's general profile.

6. Save and Close vs Save

There are two options when in edit mode - Save or Save and Close. We recommend using *Save and Close* as this will save your progress and take you out of edit mode which will prevent unintended changes.

Reference: Blue pg 28

Is there any initial setup I should do in the online system?

Taking some time to complete the following details will save you time in the long run.

- Confirm that the default recruiter is: Recruitment, Team

NOTE: You should always add your Head of Department, Divisional Head and any other approvers as collaborators on each requisition.

Your Division may also normally add the relevant Client Services Administrator and Cost Centre Administrator as collaborators to most requisitions. You can confirm how your Division is approaching this by referring to the appropriate business rules (Talk to a Client Services Administrator or contact the Recruitment Team for more information).

If any of these positions are already owners of the requisition you don't need to add them as collaborators as well.

If you forget to add these staff when creating the requisition, the Recruitment Team may add them at any time.

Owners vs. Collaborators

Basically this is the difference between someone who can make changes within a requisition and someone who can only view the details of a requisition.

Within the online recruiting system there are four positions marked as owners:

- Hiring Manager
- Hiring Manager's Assistant
- Recruiter
- Recruiter's Assistant

Users added to the collaborator's section will be able to view the requisition and add comments, but will not have editing rights. These normally include:

- Panel Members
- Approvers

Requisition Creation

What information will I need in order to fill in a requisition?

You can make the requisition creation process a little faster if you gather together some of the key information before you login to the online application.

I know:

- Who the hiring manager and assistant hiring manager (owners) are (i.e. who will manage and administer the recruitment process)
- Who the collaborators are (i.e. panel members, approvers or anyone else who will need to see the vacancy/candidate information)
- The position title (for advertising)
- If it is a new or replacement position
- If it is a professional or academic position
- If it is full time, part time or variable
- If it is permanent or fixed term
- If fixed term, why
- The salary level and range
- If it has been evaluated (where applicable)
- If there are any pertinent allowances
- The cost code for advertising
- Draft advertisement text
- A list of preferred advertising channels
- Preferred advertising start date and duration of advertisement
- Any required credential checks
- An up-to-date job description or information statement

Do I have to complete the requisition all at once?

No. There are only a handful of fields that you must fill in to be able to save your requisition as a draft. Once saved you can access and edit your requisition as often as needed. Once you have completed all fields required for approval and saved the requisition you will then unlock the approval option.

How do I complete a requisition online?

Login to the online recruiting application and click "Requisitions" from the main task bar at the top of the window. From this screen, you will see a "Create Requisition" button in the top right corner.

From there you will be guided though a short wizard to help you identify the University structure information (e.g. department, location and job family). Next you will be asked to complete the remainder of the requisition details based on your specific vacancy.

Reference: Blue pg 8

Salary Levels Selection

When you are completing the requisition choose the appropriate salary level and range from the selection list. This selection will be directly reflected in the advert on the University website.

The salary level and range for different types of positions are determined by the relevant employment agreement. The current pay scales are available on the pay scales webpage. (https://www.otago.ac.nz/humanresources/working-at-otago/salaries-and-payments/pay-scales/index.html) The salary levels and ranges within the recruitment system will be updated following any changes to the collective employment agreements.

Evaluation

The majority of professional staff positions are evaluated to determine the appropriate salary level. Information on requesting a job evaluation can be found on the job evaluation webpage. (https://www.otago.ac.nz/humanresources/toolkit/job-evaluation/index.html)

Cases where the salary is not stated

For some senior vacancies, including management roles, where we do not wish to display the salary information, select "The University is offering a remuneration level commensurate with the responsibilities of the position."

If you would like further guidance, please contact the Recruitment Team on ext. 8275 or **yourcareer@otago.ac.nz**

Funding and Budget Information

This field is available for you to communicate with your approvers and HR about any financial information related to this role. This may include:

- how salary will be covered (and salary account code, if known)
- salary level and range for management band positions, and any other vacancy where a salary level and range has not been selected
- any other allowances or benefits approvers should be aware of

- any recruitment, relocation/set up costs your approvers should be aware of
- whether the vacancy would be filled on a research funded permanent basis
- the FTE/hours for part time positions

Please note you will also have the option of attaching relevant documents if more detailed information would be useful.

Once all the information required for approval has been added and saved, you will send the requisition for approval.

Finally, after approval, the Recruitment Team will review the details, make any necessary additions or corrections and initiate the advertising process.

Credential Checking

There is a section of the requisition where you can indicate your desire to have a credential check performed. While that decision is often based on the scenarios highlighted below, we understand there may be unique circumstances surrounding your position. This selection box is your opportunity to bring that to our attention.

Credential checks can include any number of Qualification, Criminal History, Professional Membership and Credit History checks. Letters of offer can be held until the credential check result is known, or can be made 'subject to' the credential check.

As mentioned above, your client-group HR Administrator will automatically review the requisition, offer grid and appointment information to ascertain if a credential check might be required. Some of the common scenarios are as follows:

- Academic appointments to Lecturer / Senior Lecturer / Associate Professor / Professor will have their highest claimed qualification checked.
- Professional staff appointments to roles with an essential qualification requirement will have the claimed qualification checked.
- Senior management roles and other roles of significant trust (including those listed above) may have any number of credentials checked, subject to strong justification and formal agreement with HR.

Time frames are largely dependent on the organisation and country that needs to be contacted. Your HR Administrator will undertake this and keep you informed of progress.

Credential check results are strictly confidential.

What are pre-screening questions and how do I use them?

Do you ever have too many candidates and not enough time? Do you receive many applications from candidates who do not meet the basic selection criteria? You may find it useful to include pre-screening questions as part of the application process for your vacancy.

In effect pre-screening questions are a series of questions that candidates must answer when applying for your vacancy. The answers they provide can help you sort, long-list and shortlist your candidates efficiently and objectively. For example, you can view candidates who best match your requirements at the top of the candidate list. You will still have access to all candidates if you wish, this is merely meant as a time-saving tool.

Reference: Pre-screening questions fact sheet

Reference: Blue pg 22

Can I duplicate a previous requisition to speed the process?

Yes. If you have had a similar vacancy in the past, you can follow a simple procedure to duplicate that previous requisition and then edit only the necessary information.

This can save a lot of time if you advertise similar vacancies often.

Reference: Blue pg 18

Requisition Approval

What is the approval process for requisitions?

Once you have added all the required information to the requisition, you can access the 'request approval' function. You may need to add, edit or reorder the approvers based on the specific requirements of your requisition.

An approver will receive an email with a link to all key information for their consideration.

Approval options are: APPROVE; PASS; DECLINE.

Approvers in an approval chain can add notes as they go, so the next approver can receive information with the previous approvers' comments attached. If any changes need to be made, an approver will decline and be able to add a note for the Hiring Manager to action the change.

1. Approvals for all Requisitions

Work within your area to ascertain who within the management chain is required for your approvals (e.g. supervisor / HoD, etc.).

In addition to those approvals, all requisitions require the approval of the Divisional head, unless the Divisional head has formally delegated that decision elsewhere. Health Sciences for example have some aspects delegated to Deans.

All other areas of the University require the Divisional head (this could be a Service Div Director, COO, PVC, DVC, or VC).

Without this top-level approval HR cannot take any action on your request.

2. Extra Approval Sometimes Required

The above online approvals are always required before a requisition reaches HR. In certain situations HR may require further approval but we will manage that process. You do not need to take additional action in these situations but be aware that this is part of the process and may add slightly to the processing time:

- Chair and Professorial positions also require Vice Chancellor approval
- Direct to Offer permanent positions also require:
  - Directors for: professional staff,
  - Vice Chancellor or Staffing Advisory Committee for: Lecturer, Senior Lecturer, Associate Professors & Professors
  - Direct to Offer fixed term >12 months require HoD or Manager approval.

Refer to the HR Tool Kit for Delegations for exception approvals

Position Post and Source (Advertising)

Who arranges the advertising?

Once the approval process is complete the Recruitment Team will work with you to get your advertisement out to the world. As a rule, advertised positions are always posted on the University Careers website and within the Staff Bulletin, but there are a host of other options available depending on the level of the position and the expected difficulty in filling the position. To find out more about the national and international options available contact a member of the Recruitment Team.

If you would like advice or have any queries, please contact the Recruitment Team on ext. 8275 or **hr.advertising@otago.ac.nz**.

Once the Recruitment Team has this information

We will place the advertisement on your behalf. This involves:

- Obtaining media options (upon request) for hiring managers.
- Formatting and proofreading the advertisement and the job description or information statement.
- Providing quotations (upon request) for hiring managers.
- Obtaining authorisation of the final cost quotes and proof.
- Our recruitment advertising agency places the advert in the chosen publications and websites.
- Placing the advert on the University's career website. These adverts include links to departmental websites and other relevant information on living and working in Wellington, Christchurch, or Dunedin.
- Notifying candidates who have expressed an interest in this type of role
- Sending you a confirmation email, with a link to our website, and confirmation of where your advert has been placed.
- Charging your nominated cost centre for 3rd party advertising costs. The recruitment team processes invoices in Finance One monthly.

Candidate Management

Sorting and filtering

There are several features in the system to help you manage large numbers of candidates easily. There are different ways of sorting candidates - for example you can have all internal candidates appear at the top of a list. You can also limit the size of the list you are viewing using filters - for example if you have rejected a number of candidates because they did not meet the essential requirements, you can use a filter to remove them from your view.

Reference: Blue pg 24

Late Applications

An application can be accepted after the closing date for the position at the selection panels discretion, however the candidate must still go through the same process and apply online.

Please contact the Recruitment Team for a late application link to be sent to the candidate.

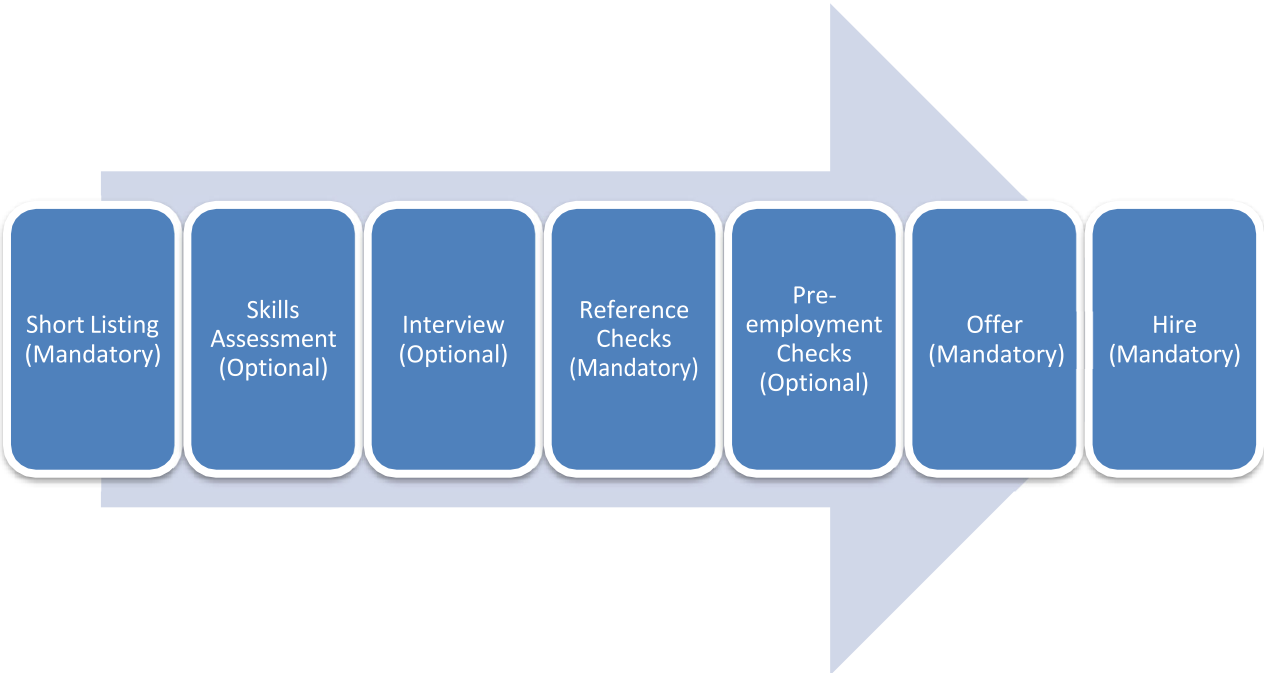
Candidate Selection Workflow

There are also a series of steps that you will walk all candidates through as they progress through the hiring process. This makes both a valuable record of each candidate's journey and allows you to easily see where each candidate is in the process and what action you might need to take next.

Reference: Blue pg 35

1. General Candidate Selection Workflow (CSW)

There are seven steps in the general staff workflow.



Within each of these steps there are several statuses available that will help you keep track of exactly where each candidate is in the process. For example, you can mark a candidate in the Interview step with a status of 'To be scheduled'. Then once you have made the proper arrangements, you can change that status to 'Scheduled'.

Though the labels are a little different at each Step, there are three basic types of status you will see:

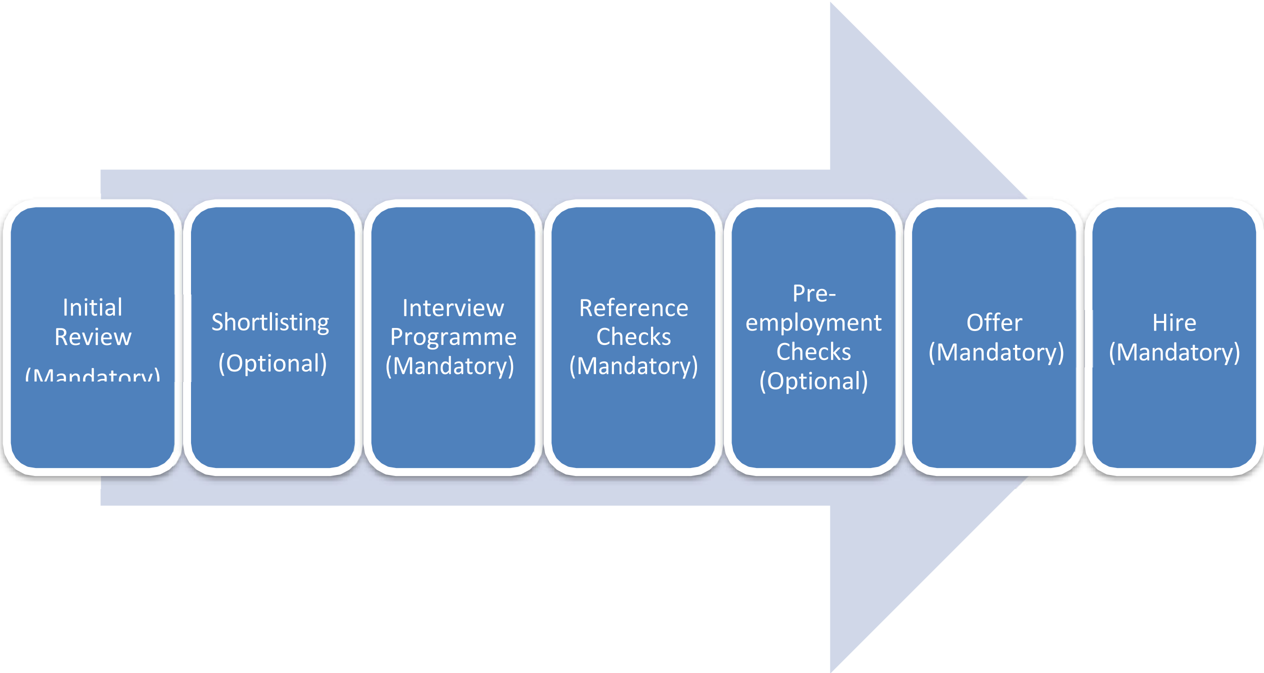
- In progress (review or schedule)
- Step completed
- Process ending (rejected or withdrew)

You must always mark a Step as complete before you can move to the next step.

Finally remember that some actions are dependent on the candidate being in a Step / Status before you can gain access to the feature. For example, you cannot create an offer until you have one candidate in the Offer step.

2. Academic Candidate Selection Workflow (CSW)

There are some slight differences in the academic staff workflow, but still seven steps.



See the explanation above (General Candidate Selection Workflow) for more information on step/status.

Can the panel members or other contributors view the candidates online?

Yes. Anyone you have set up as a collaborator for that requisition will have full viewing rights online - including attachments. They will be able to add comments but will not be able to make any changes to the requisition.

Comments and Documentation (Important notes)

Please be aware that applicants may raise dissatisfaction with the recruitment process, either directly with the University or with the Human Rights Commission (depending on the gravity of their concerns). Keeping good comments means having appropriate records available if the applicant challenges any part of the recruitment process. This will enhance the integrity and credibility of the process.

Therefore, we strongly recommended you keep written records of both the process and decisions. Be aware that any information held in the recruitment system is transparent and discoverable. In other words, we may be required to share all comments and records publicly in the event of a challenge to the recruitment process.

In addition to information held in the recruitment system, any other records of recruitment decisions, including shortlisting and interview notes, should be stored securely for 12 months then confidentially destroyed.

Candidate Screening and Interviewing

Skills Testing

We have a wide variety of Skills testing options available which can be useful with some vacancies to support and help lend objectivity to the candidate evaluation process. Please contact the Recruitment Team to discuss this in further detail.

Interview questions

The Recruitment Team can help with preparing interview questions as required, please contact the Recruitment Team on ext. 8275 or **yourcareer@otago.ac.nz**.

Offer Management

How do I make an offer once I have found my ideal candidate?

Once you have advanced the preferred candidate through to Offer/Offer to be Made step/status of the applicable Candidate Selection Workflow, you will gain access to the Create Offer function.

The entry form that follows is called the Offer Grid and is found in the Offer tab on the candidate record. See below for the type of information required to complete the offer grid.

What information will I need to create an offer?

You can make the offer creation process a little faster if you gather some of the key information before you begin.

I know:

- The position title as it should appear on the Letter of offer
- The primary location
- If it is a confirmation path position
- Who the position reports to
- If the preferred candidate is new to the University or an existing staff member
- If an existing staff member, department/position information for the job they are leaving
- Start date
- If fixed term, the end date
- Position type (full-time, part-time, etc.)
- Hours per week (or FTE for academic)
- Schedule details if not standard (e.g. 8:30 - 2 Monday to Thursday)
- Student status (are they enrolled)
- Employment agreement
- Salary information
- Information on which account(s) the salary will be paid from
- Information on any applicable allowances (relocation, establishment grant, recruitment and retention etc.)

How do I enter the details of an offer?

Fill in the Offer Grid with information pertinent to your position. Information from the requisition can automatically populate the Offer Grid and then you can change / add information.

As with the requisition, there is no need to finish the Offer Grid in one sitting. It will be considered Draft until it has been approved.

Reference: Offer Grid Fact Sheet

Reference: Blue pg 48

How do I get the offer details approved?

Once you have captured all the relevant offer details, you must send the offer for approval within the recruiting system.

Reference: Blue pg 48

Work within your area to ascertain who within the management chain is required for your approvals (e.g. supervisor / HoD, etc.).

In addition to those approvals, all offers require the approval of the Divisional head (this could be a Service Division Director, COO, PVC, DVC, or VC). In some areas approval for certain roles has been delegated so checking the correct approval chain for the area you cover is advisable.

Note*: Without this top-level approval HR cannot take any action on your request.

Note**: Approval levels/delegations can change.

What happens after HR takes over the offer process?

Once approved, your client-group HR Administrator will review the Offer Grid and appointment information and will contact you if there are any questions. If a VCA/Police check is required, your HR Administrator will undertake this and keep you informed of progress.

Your HR Administrator will then prepare and issue the letter of offer, providing you with a copy.

Candidate Hire

What happens once the offer has been accepted?

Once the formal acceptance is received, you will be advised.

The Payroll team will then ensure the appointee is set up for salary payments and web kiosk access.

Finally, if required, the Relocation Coordinator will make any relocation arrangements and keep you informed of progress.

Informing Unsuccessful Candidates

Interviewed Candidates

We recommend that all interviewed candidates are verbally advised of the outcome by someone from the panel. This gives the candidate a chance to ask for feedback and is important part of University of Otago candidate experience.

Once the candidates have been verbally advised of the outcome, you need to let the Recruitment team know on **your.career@otago.ac.nz** and the system will be updated appropriately. Please note - verbally rejected candidates will not receive additional rejection correspondence from the University.

Candidates who are not shortlisted

Email the Recruitment team on **your.career@otago.ac.nz** once you have moved these candidates to the rejected step in the recruitment system and you are ready for formal rejection correspondence to be sent. Please note – this correspondence can be sent at any stage after the advertising has closed.

Online Recruiting

Advertised Vacancies

Hiring Manager Reference Guide

UNIVERSITY of OTAGO
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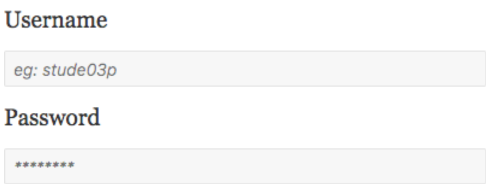
NEW ZEALAND

Blue Section: Reference Guide

1: Recruiting Centre and My Setup

Logging into the Recruiting Area

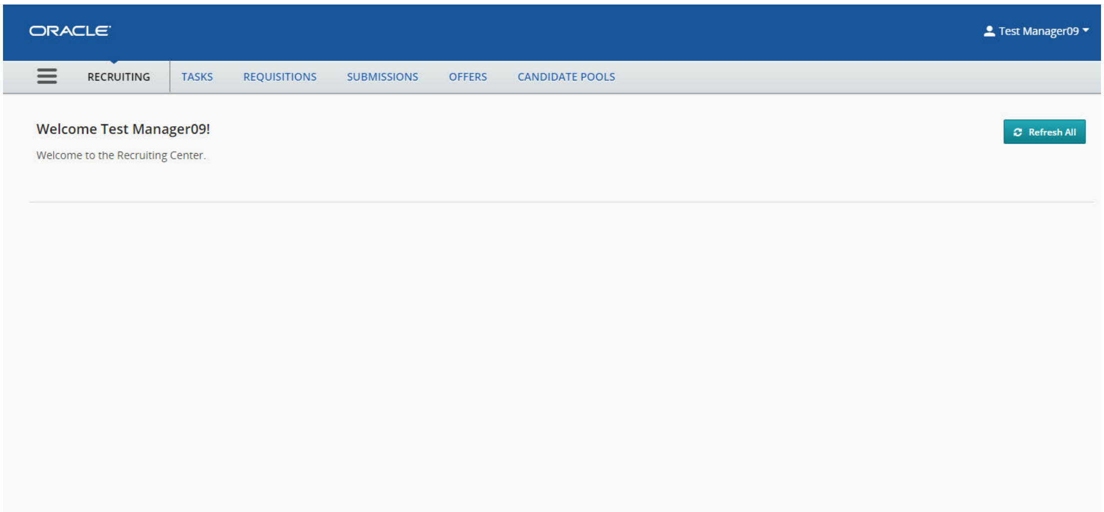
Accessing the Recruiting Area is simple. You need to provide a username and password at the Sign in page.

Step	Action
1	To sign into online recruiting system, enter the following URL into your Internet Explorer address bar: http://tas-otago.taleo.net/enterprise/fluid?lang=en **NOTE:** this link is to the **live recruiting system**. If you would like to login to the training system to practice, contact one of the Recruitment Team for assistance.
2	Enter your **Username.** Your University username is the same username you use to sign on to your computer. 
3	Enter your Password (your university password - the same password you use to sign on to your computer).
4	Click the **Login** button. 
5	End of Example. Cross Reference: Red pg 3

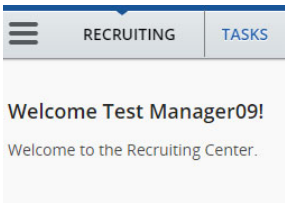
Navigating the Recruiting Home Page

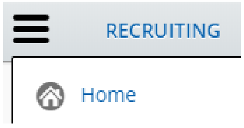
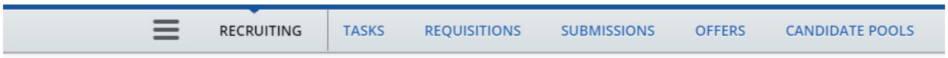
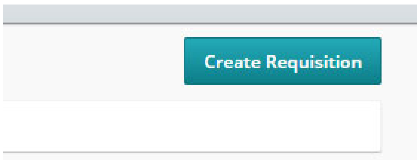
To familiarize you with navigating through the system, this section introduces the main areas of the Recruiting Home page.

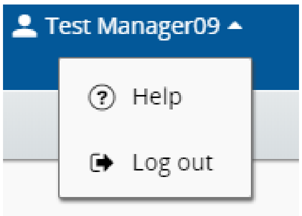
Recruiting Home Page



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Always use the navigation options within the recruitment system.

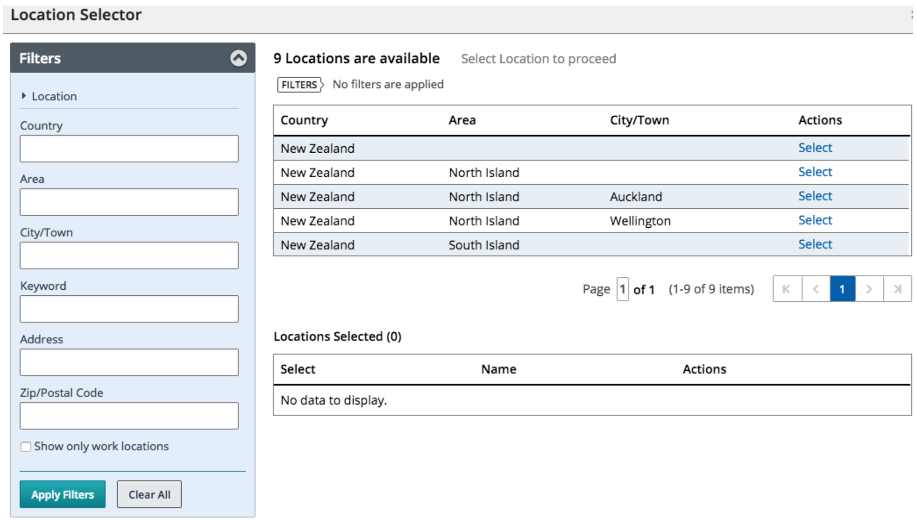
NOTE: Using the browser buttons (back, forward, refresh, etc.) can cause issues that may lead to you re-entering information.</td></tr>
<tr><td>2</td><td>Return to the Recruiting Home page at any time by clicking on the Recruiting option in the Top Navigation Menu.

</td></tr>
</table>

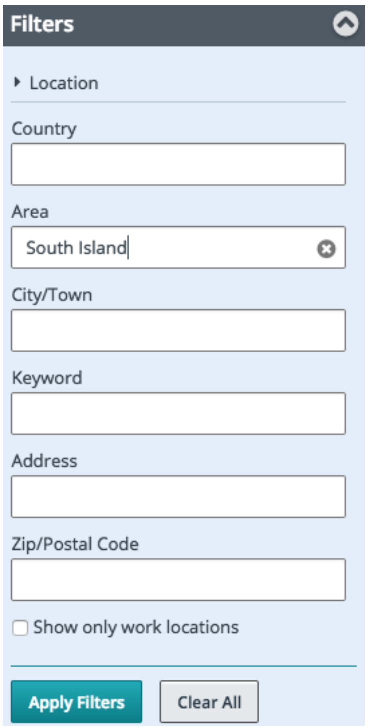
3	The **Home** option currently has no function assigned. It will loop you back to the **Recruiting System Home Page.** Please use the **Recruiting** button or **Requisition** button instead. 
4	The majority of tasks in the online recruiting system will be started from the **Top Navigation Menu**.  **'Tasks'** Launches the list view of your tasks to complete. An example of a 'task' could be: 'complete requisition' **'Requisitions'** launches the list view of all your vacancies. This view gives a quick look at the number of applicants for each requisition as well as detail on the current status of the requisition. Click on the title of any of the listed requisitions to launch the individual view of that vacancy. From the Requisitions screen, you can also create a new requisition by clicking **'Create Requisition'** in the top right corner.  This launches the vacancy requisition wizard where you can enter the details of your vacancy. This is the starting point if you have a new vacancy to fill. **'Submissions'** launches the list view of all your candidates grouped by requisition. This view gives a quick look at some applicant details such as available attachments, internal candidates, and details on where a candidate is in the overall process. Click on a candidate's name to launch the individual view of that candidate. **'Offers'** Launches the list view for offers. **'Candidate Pools'** Launches the view of your personal candidate pools and candidate pools that have been shared with you.

5	The **Log Out** option is found in the top right of the application window. It is best practice to always log out before closing your browser window. 

Selector Buttons

Throughout the software many fields have a **Selector** button that will launch a lookup tool to help you identify appropriate responses. The following example demonstrates using the **Selector** button with the Location field, but this technique can be used on any field with a **Selector** button.

Step	Action
1	Locate the Location field and click the **Selector** button to the right. 
2	Identify the correct choice from the provided list and click the corresponding **Select** button.  **NOTE:** The filters on the left can be very helpful with longer lists.

Step	Action
3	With longer lists, you can add details to any of the **Filters** and click the **Apply Filters** button below the fields.  With this filter in place only locations on the South Island will display. **NOTE:** To **clear a Filter**, click the small **x** in the right of the entry field. If you would like to clear all filters there click the **Clear All** button.
4	End of Example. Cross Reference: Red pg 3

TIP: Entry Shortcut

The **Selector** button can be very helpful, but **there is a faster way**. The following example uses Location but this technique can be used in any field with a **Selector** button.

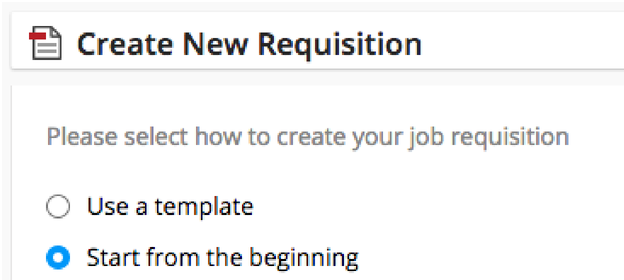
Step	Action
1	Click inside **Location** field to add text.
2	Type at least two letters of the **Location** (i.e. *Du for Dunedin*). You should see the location appear. 
3	Press **Enter** to accept the choice, or use the mouse to select the appropriate entry if there is more than one result.
4	End of Example.

2: Requisition Creation and Approval

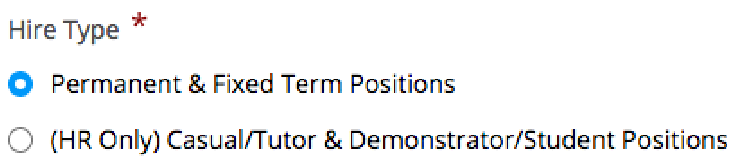
Creating a Requisition

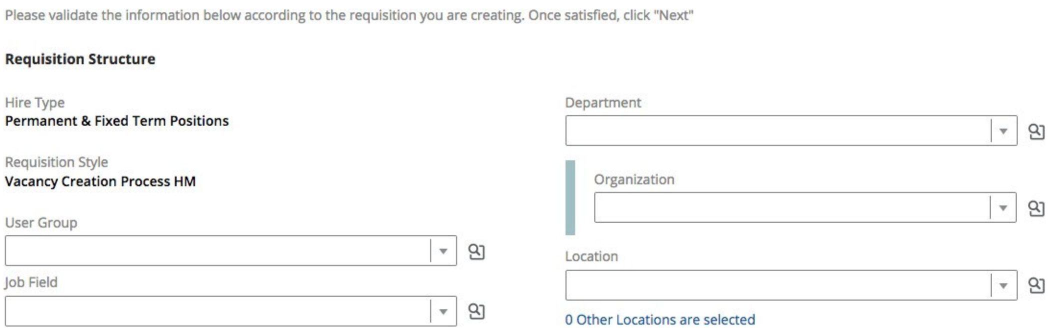
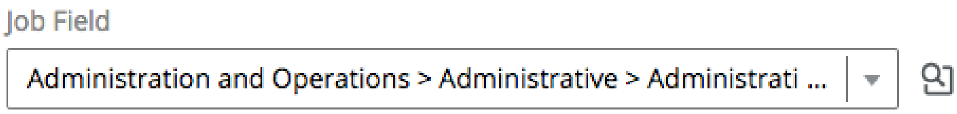
This example walks you through creating a requisition. The Entry Shortcut outlined in the Navigation section can be substituted for any Step which uses the **Selector** button.

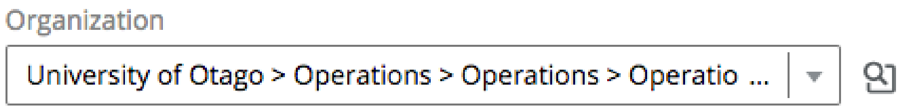
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Recruiting Home page click on the Create a Requisition button.

</td></tr>
<tr><td>2</td><td>Choose to Use a Template or Start from the beginning.


NOTE: This example will start from the beginning with a blank requisition form.</td></tr>
<tr><td>3</td><td>Click the Next button.

</td></tr>
<tr><td>4</td><td>The Create a Requisition Wizard will launch. Keep the default. We are currently only using the Permanent & Fixed Term option.

</td></tr>
</table>

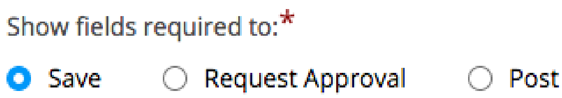
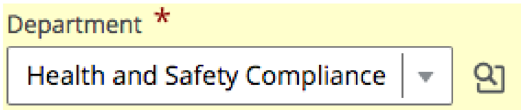
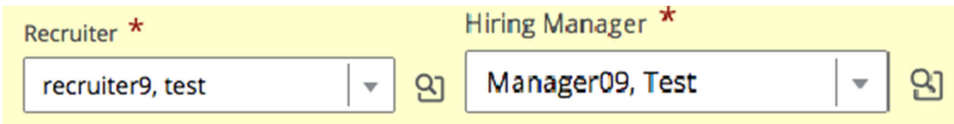
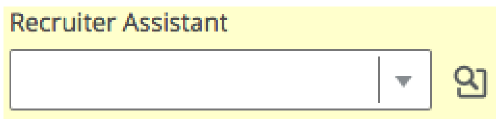
Step	Action
5	Click the **Next** button. 
6	You will be asked to enter some information about the role and the location in the **Requisition Structure** window. 
7	Locate your **User Group** and click the corresponding **Select** button. 
8	Locate your **Job Field** and click the corresponding **Select** button. The Job Field is used for reporting purposes and helps to identify your role to interested candidates via a Job Seeker Alert email notification.  **HINT:** Be sure to select only those entries with all three levels defined. See the Job Family fact sheet for more information.
9	Locate your **Department** and click the corresponding **Select** button.  **NOTE**: Selecting your **Department** may autofill information for **Organization** and **Location.**

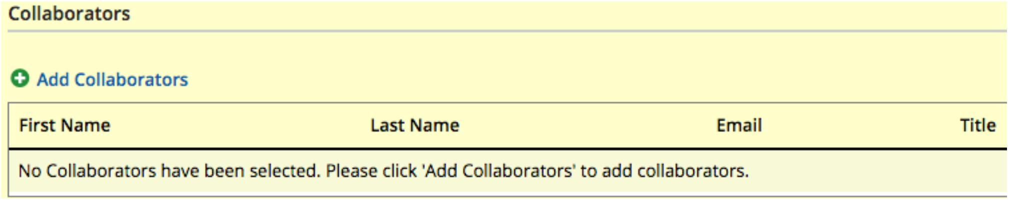
Step	Action
10	Locate your **Organisation** and click the corresponding **Select** button. 
11	Locate your **Location** and click the corresponding **Select** button. 
12	Click the **Next** button.  Next, review and complete the remaining details for the requisition.
13	You should now see the full requisition form which is broken up in to **5 sections:** Structure Information, Vacancy Management Information, Remuneration and Budget Information, Sourcing/Advertising Information, and Credentials.
14	Review the list of fields required for completion, in the **Left-hand panel**.

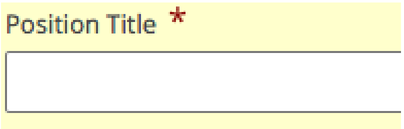
There are different levels of information required for an initial draft save, to request approval and for posting. You do not have to fill in all details at once.

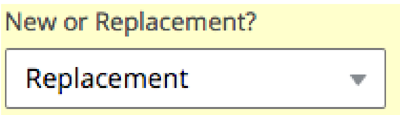
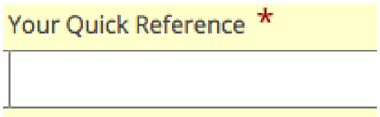
15 Collapse the right-hand panel by clicking on the **arrow**.

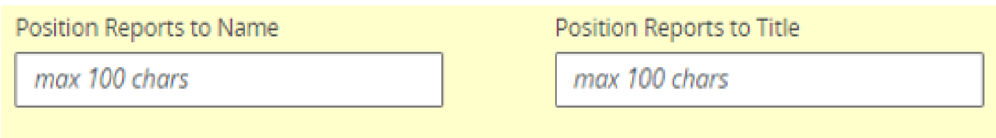
NOTE: You can open it again at any time by clicking on the arrow again.

Step	Action
16	Different levels of information are required in order to Save, Request Approval, or Advertise (Post) the requisition. Complete the remaining details for your **Requisition**, ensuring that all the mandatory fields *(indicated by *)* are filled in. Locate and click the **Show Fields Required To** button to change. 
17	Review the **Structure reference should reflect what is seen**. If there are any corrections, click the **Modify Structure** button at the top of that section and make the needed adjustments.
18	Locate the **Department** field.  Confirm it is correct based on your division. If not, contact the recruitment team for assistance.
19	Locate the **Recruiter** and **Hiring Manager** fields. 
20	*(Optional)* Locate the Hiring Manager Assistant and Recruiter Assistant field.  Add the name of anyone who will assist you with the vacancy, to whom you would like to give full rights *(e.g. they can make changes)*.

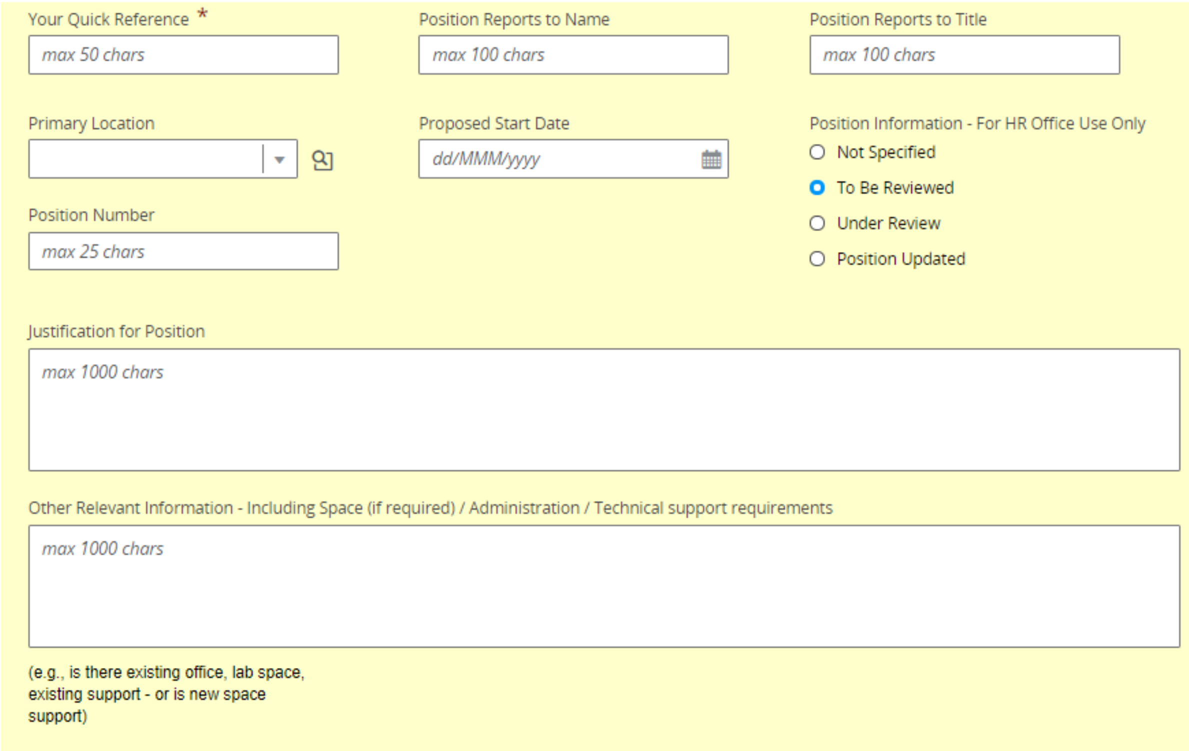
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>21</td><td>Locate the Collaborators section.


Add the name of anyone who will assist you with the vacancy, to whom you would like to give read only rights (e.g. they can't make changes).</td></tr>
<tr><td>22</td><td>Locate the Position Title field.


Add the position title as it will appear on the Internet Career portals and in advertisements.</td></tr>
<tr><td>23</td><td>Identify if the position is New or Replacement.

</td></tr>
<tr><td>24</td><td>Modify the Number of Openings if needed.</td></tr>
<tr><td>25</td><td>Locate the Your Quick Reference field.


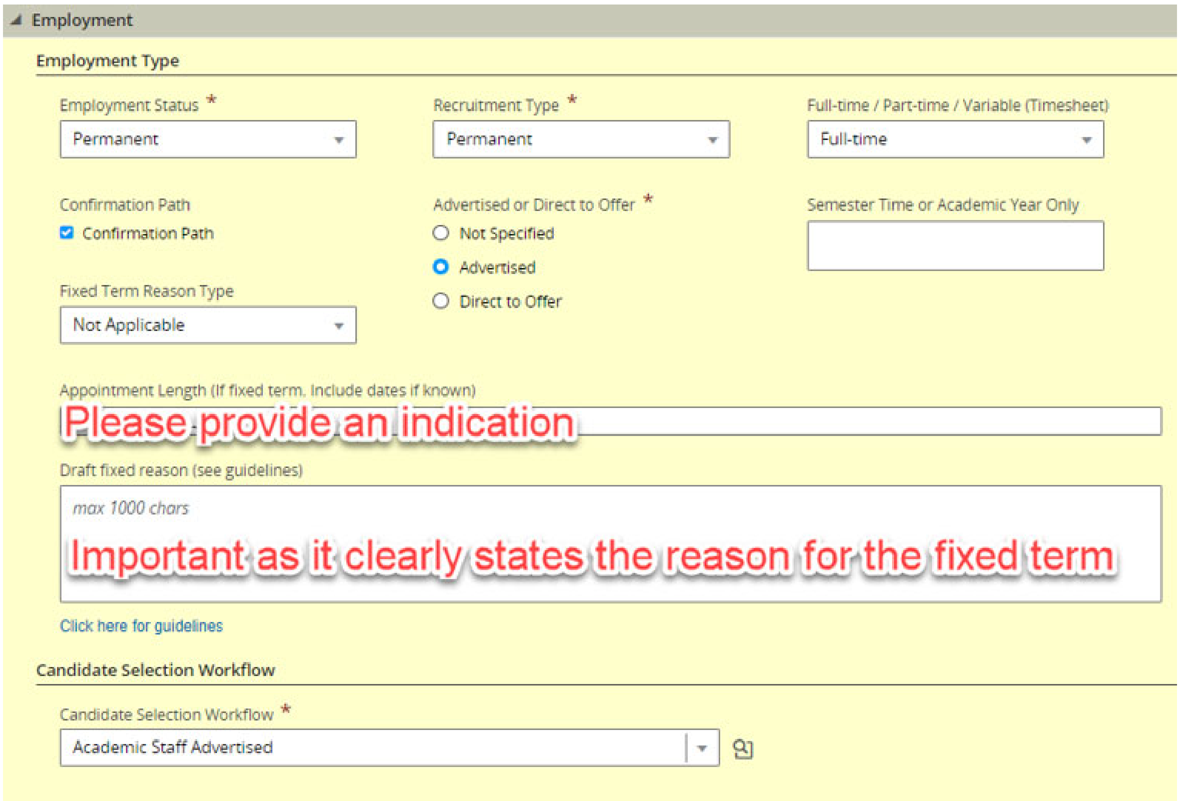
Add a name that will have significance for you (e.g. Sam's replacement)</td></tr>
<tr><td>26</td><td>Add in line reporting details

</td></tr>
</table>

27

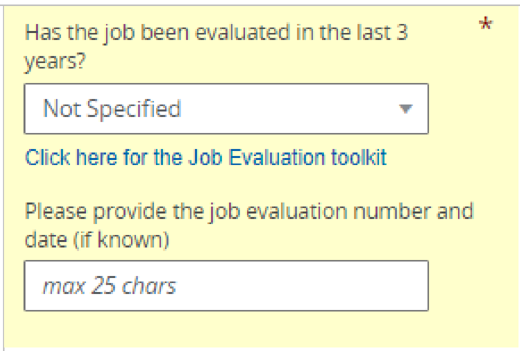
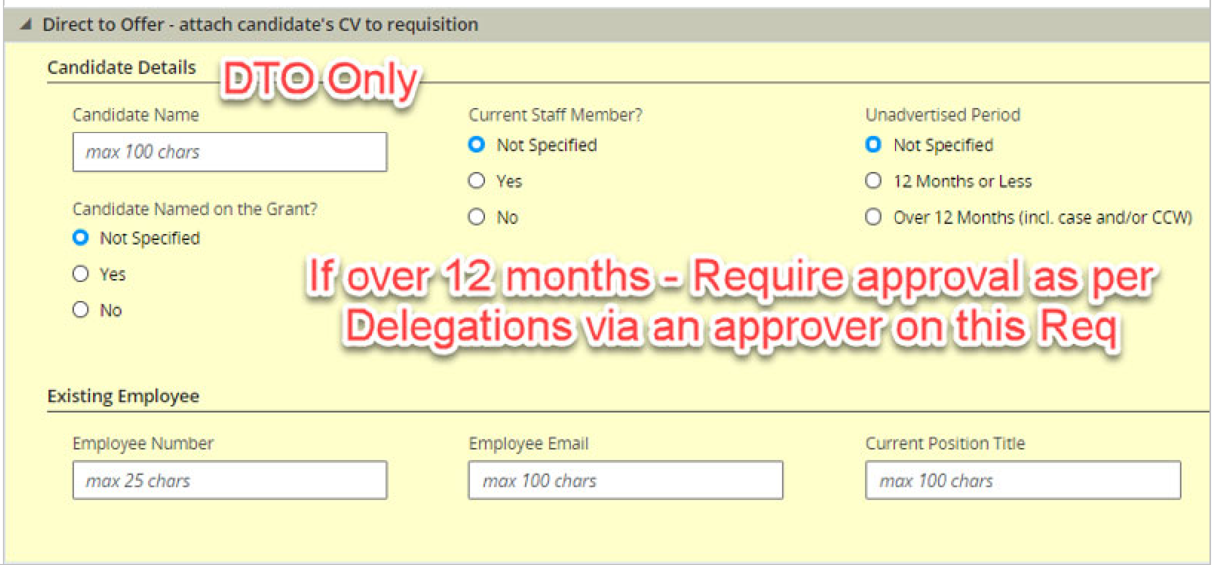


28

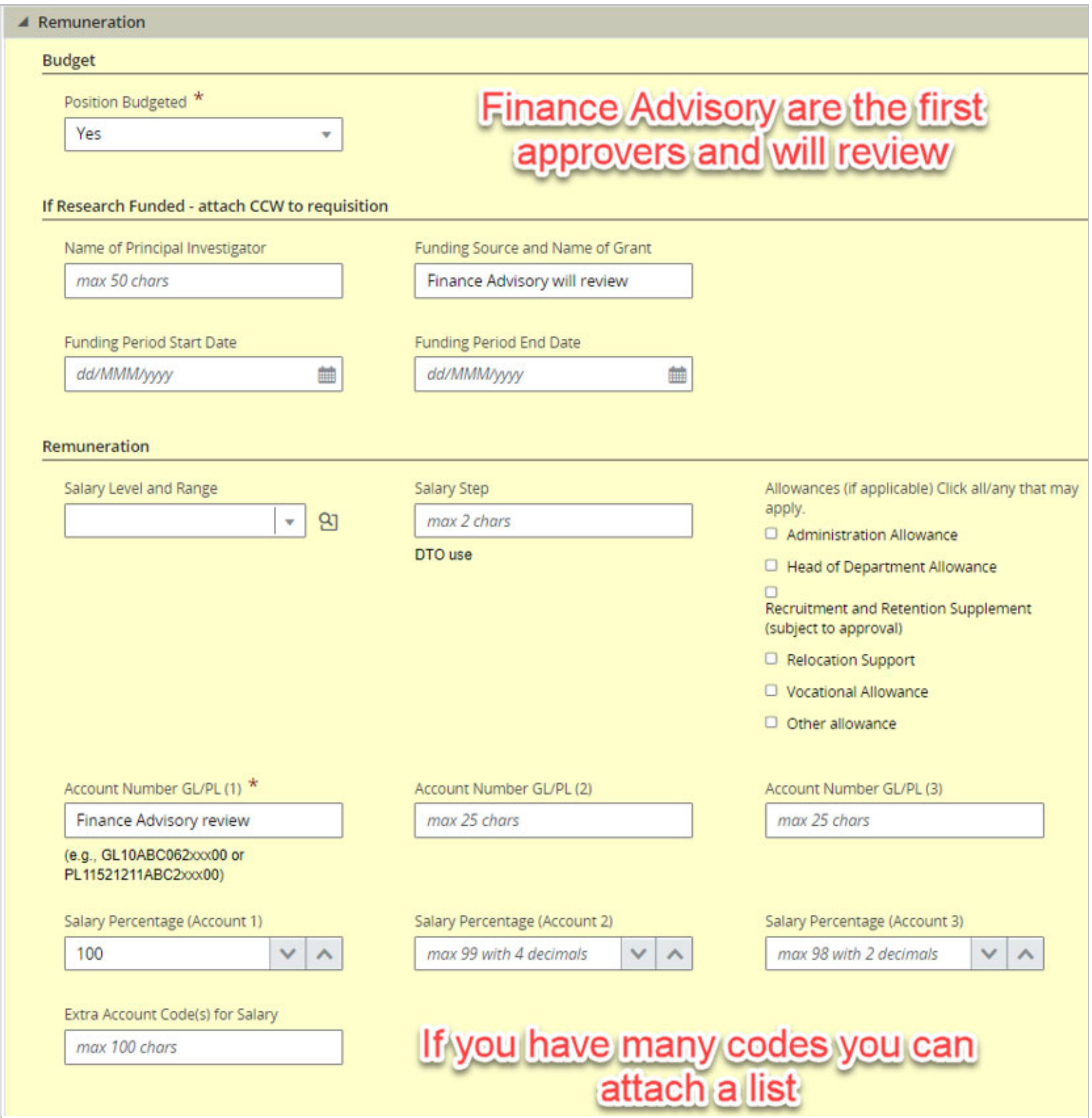
Locate the **Employment Type** section and make the appropriate choices for your position.



For Professional or General positions, locate the **Job Evaluation** section and choose the appropriate option.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>29</td><td>Direct to Offer section

</td></tr>
</table>

Step	Action
30	Locate and complete the **Remuneration** section, noting that your Finance Associate or Manager as the first approver will review this section.



Remuneration

Budget

Position Budgeted *

Yes

Finance Advisory are the first approvers and will review

If Research Funded - attach CCW to requisition

Name of Principal Investigator

max 50 chars

Funding Source and Name of Grant

Finance Advisory will review

Funding Period Start Date

dd/MMM/yyyy

Funding Period End Date

dd/MMM/yyyy

Remuneration

Salary Level and Range

Salary Step

max 2 chars

DTO use

Allowances (if applicable) Click all/any that may apply.

- Administration Allowance
- Head of Department Allowance
- Recruitment and Retention Supplement (subject to approval)
- Relocation Support
- Vocational Allowance
- Other allowance

Account Number GL/PL (1) *

Finance Advisory review

(e.g., GL10ABC062xxx00 or PL11521211ABC2xxx00)

Account Number GL/PL (2)

max 25 chars

Account Number GL/PL (3)

max 25 chars

Salary Percentage (Account 1)

100

Salary Percentage (Account 2)

max 99 with 4 decimals

Salary Percentage (Account 3)

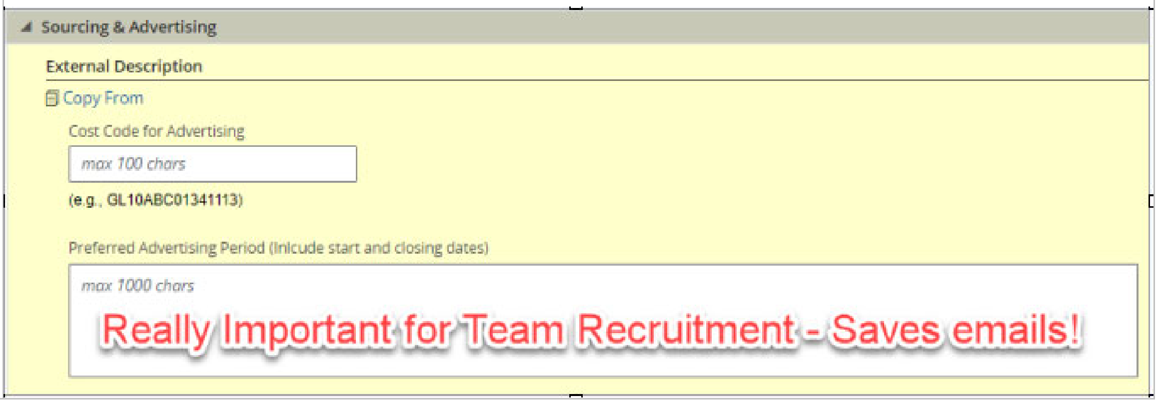
max 98 with 2 decimals

Extra Account Code(s) for Salary

max 100 chars

If you have many codes you can attach a list

28 Locate the **Cost Code** section and enter the appropriate cost code



Sourcing & Advertising

External Description

Copy From

Cost Code for Advertising

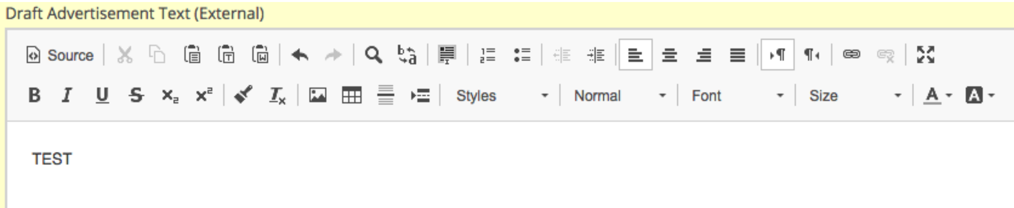
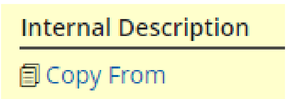
max 100 chars

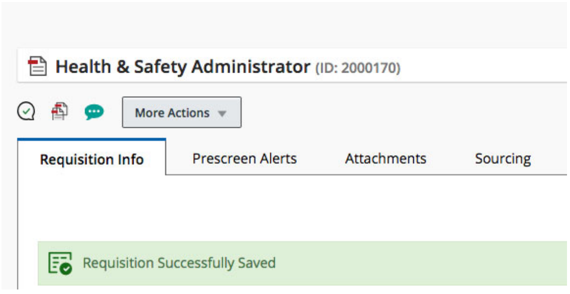
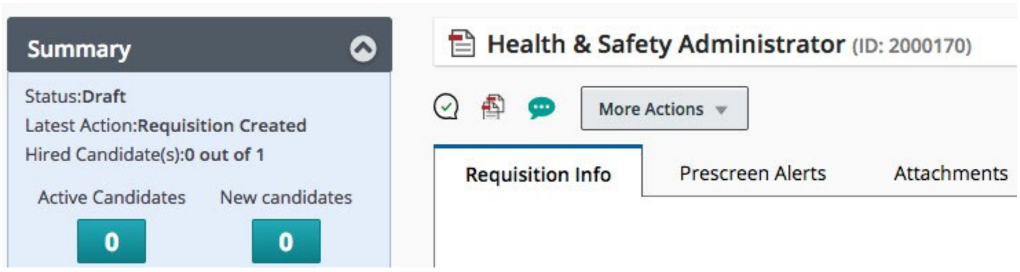
(e.g., GL10ABC01341113)

Preferred Advertising Period (Inlcude start and closing dates)

max 1000 chars

Really Important for Team Recruitment - Saves emails!

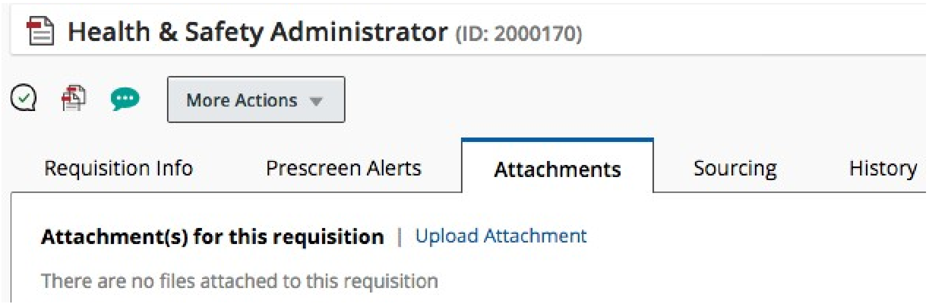
Step	Action
29	Locate the **Draft Advertisement Text (External)** field. Enter text as required.  If Pasting content from Microsoft Word, use the **Paste from Word** button to retain your formatting. 
30	Locate the **Text for Advertisement (Internal)** field. If the internal advertising text is going to be the same as the external text you can use the **Copy From** button to copy the text from the External field. 
1	Complete the remainder of the **Sourcing/Advertising** section as per the details of your position.
2	Indicate your preference in the **Credentials** area. **NOTE:** There are rules surrounding the use of credential checks. You can request the use of credential checks in this form, but they will only be done if approved.
33	Indicate your preferences in the **Prescreening** area.

Step	Action
34	Once all the relevant fields have been completed click on the **Done** button in the top right-hand corner. 
35	After clicking **Done** 'Requisitions Successfully saved' should appear. 
36	Review the **Summary** on the left panel. Notice the Status for this requisition is **Draft** *(until approved)*. 
37	If you need to attach anything such as: advertisement, additional approval forms, IFC do this in the **attachments tab.** 
38	Return to the **Recruiting Home Page** by clicking on the **Recruiting** option on the **Top Navigation Menu**
39	End of Example. Cross Reference: Red pg 5, 6

Attaching a Job Description (or other document)

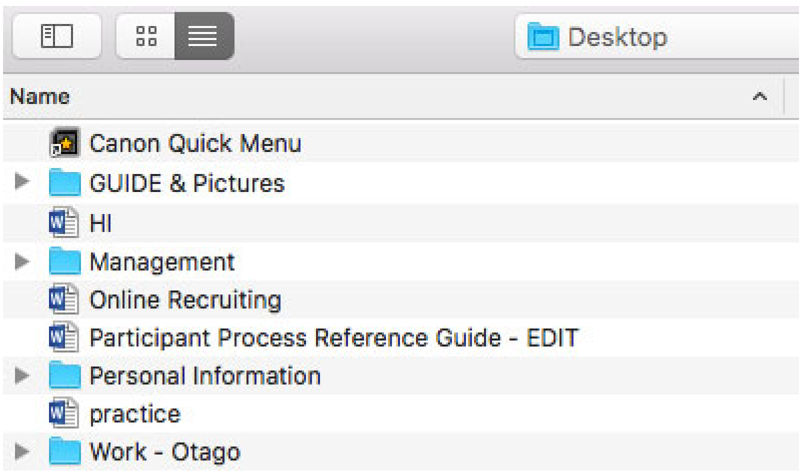
This example assumes that you are already viewing the individual requisition that you would like to attach a document to. If not, from the Requisition Home Page choose View Requisitions → then click the Title of the appropriate Requisition.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on the Attachments tab and click Upload Attachment.

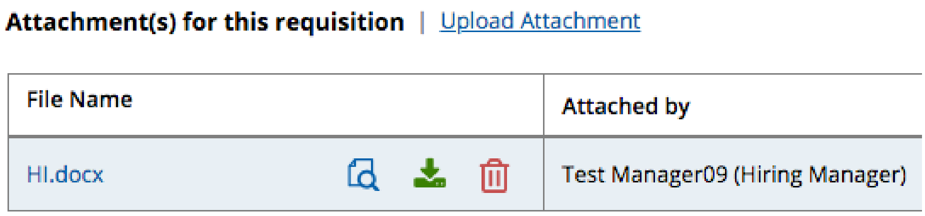


</td></tr>
<tr><td>2</td><td>Locate and click on the Browse button.

</td></tr>
<tr><td>3</td><td>Locate and select the file on your computer. Then click the Open button.

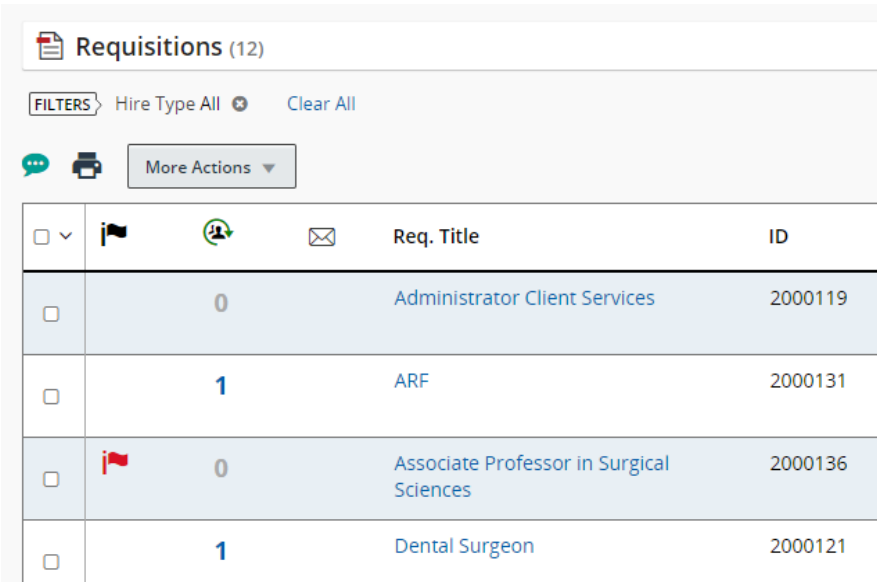
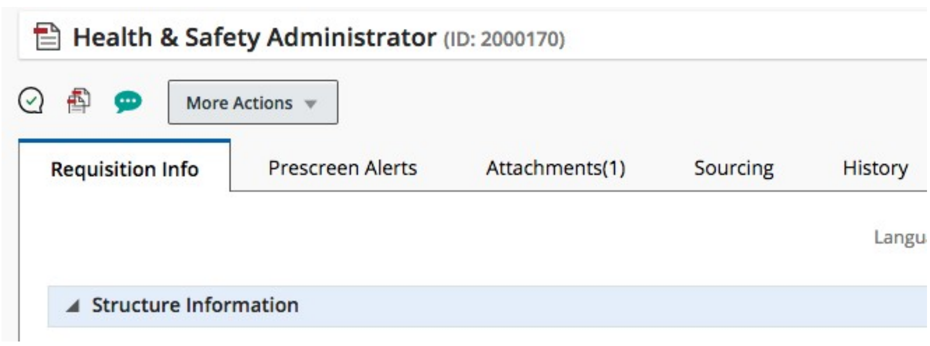


</td></tr>
</table>

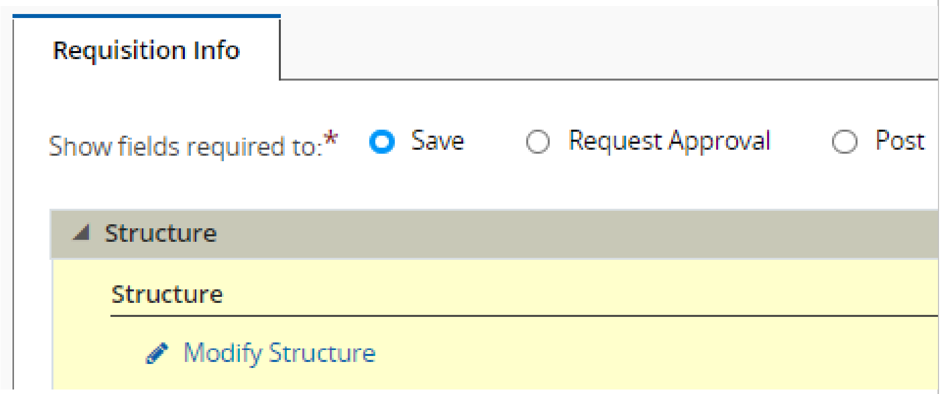
Step	Action
4	Click the **Upload** button to upload the file.  You should see the file appear in the attachments list.
5	If you need to delete a document from the attachments move your mouse over the document you would like to remove. You will see a **red trash can** to the right of the document name. Click the **red trash can** to remove it from your list. 
6	End of Example.

Duplicating a Requisition

The Duplicate button is located on the Action Bar when viewing an individual Requisition File. The example assumes you are in an individual Requisition File.

Step	Action
1	Locate the **Requisition** you would like to duplicate 
2	Click on **the title** of the requisition you would like to duplicate to open it. 
3	Click the **Duplicate** button to duplicate this requisition. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>You now have a copy of the requisition.

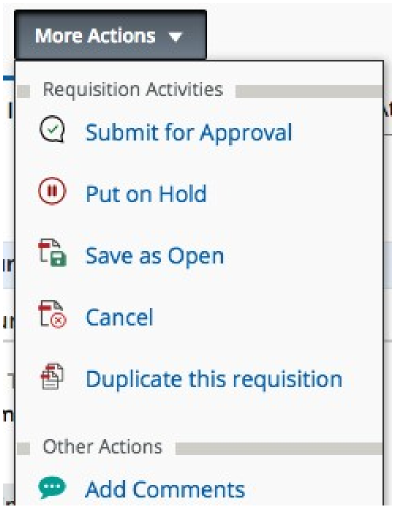
You will automatically be taken to the Requisition detail page. The details will be identical to the original Requisition. You can verify it is a duplicate by confirming the page title is Create New Requisition – Duplicate an existing requisition, and there is no Requisition number yet generated.

</td></tr>
<tr><td>5</td><td>Review the requisitions details and make amendments as necessary. Remove Position No. and select To Be Reviewed radio button. Any attachments that are not relevant to the new appointment will also need to be removed.</td></tr>
<tr><td>6</td><td>When the requisition has been fully reviewed, click the Done button.

</td></tr>
<tr><td>7</td><td>End of Example. Cross Reference: Red pg 8</td></tr>
</table>

Getting a Requisition Approved

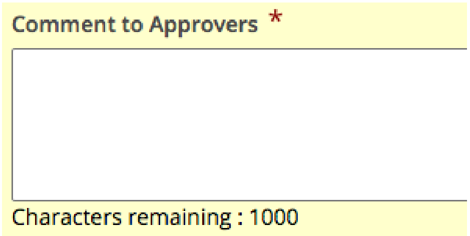
When you are ready to change your requisition status from Draft to Open, you must get approval first. This example assumes that you are already viewing the individual requisition that you would like to have approved. If not, from the Requisition Home Page choose View Requisitions → then click the Title of the Requisition in question.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Locate the More Actions menu in the action bar and click to reveal the drop-down menu.


</td></tr>
<tr><td>2</td><td>Click Submit for Approval.


</td></tr>
<tr><td>3</td><td>In the dialogue box that appears, confirm that the correct approvers are listed and that they are in the correct order (1= first approver).

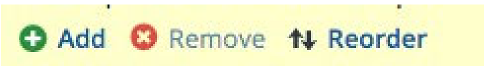
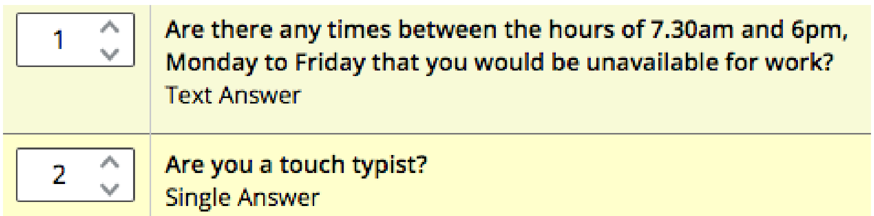

</td></tr>
</table>

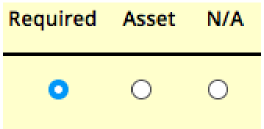
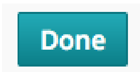
Step	Action
4	If you need to add another approver, locate the **Add Approvers** button and add as necessary. 
5	Enter relevant **Comments**. 
6	Click the **Submit for Approval** button. 
7	Review the Summary on the left panel. Notice the Status for this requisition is now **Pending/To Be Approved**. 
8	When the approval is complete the Status will update to **Open/Approved**.
9	End of Example. Cross Reference: Red pg 9

4: Prescreening Questions

Adding Prescreening Questions

The Prescreening section is found at the bottom of the Requisition. You will need to be in Edit mode to add questions to your requisition. This exercise will walk you through adding questions to include in your Prescreening questionnaire.

Step	Action
1	Open the requisition you would like to add Prescreening questions to and make sure you are in **edit mode** on the requisition tab.
2	Scroll to the **Credentials** section.
3	Locate the **Prescreening** toolbar and click the **Add** option. 
4	Within the question library, locate and select appropriate questions. We usually recommend between 5 and 10 questions depending on the position - see the Prescreening Question fact sheet for more detail.
5	Click the **Add Questions** button. 
6	Adjust the order of the questions as necessary. To do so, adjust the number at the left of each question.  Click the  button to make the adjustment.

Step	Action
7	Set each response as Required, Asset or Not Applicable.  **NOTE:** HR will review these choices to ensure they are configured correctly, so if you are unsure how to configure these, contact the Recruitment Team for support.
8	When you are finished click the **Done** button. 
9	End of Example. Cross Reference: Red pg 8

5: Candidate Management

Viewing and Filtering Candidate Lists

You have several options available to view and filter the Candidate List; these actions assist you in managing candidates as efficiently as possible.

NOTE: The following examples highlight some of the options available, but do not represent a complete procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Requisition Home page click on the number of candidates on your requisition.

Assistant Research Fellow 1 2000131</td></tr>
<tr><td>2</td><td>Review the list of Candidates who have applied or been matched to your requisition.

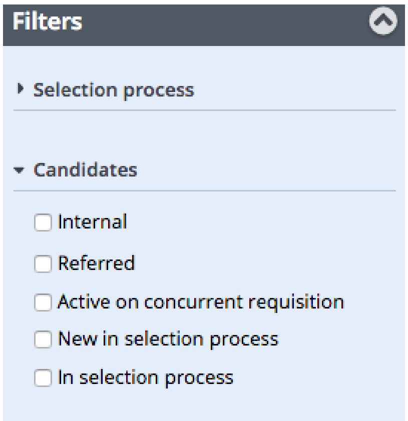
Review the summary information. Hover your mouse over any of the available icons to see a definition of its meaning.

Within this page you can see summary education information and identify submissions from internal candidates, those requiring attention and those with available attachments.</td></tr>
</table>

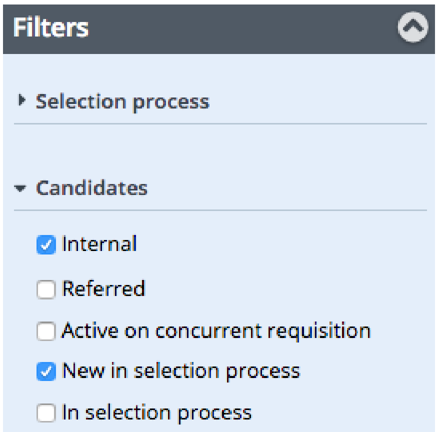
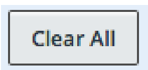
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click on any of the column headers to sort candidates by that criterion.

</td></tr>
<tr><td>4</td><td>OR

Use the Filters panel on the left to limit the number or type of candidates that will appear in your list.</td></tr>
<tr><td>5</td><td>Click on the Candidates option in the quick filters area to reveal your available filter choices.

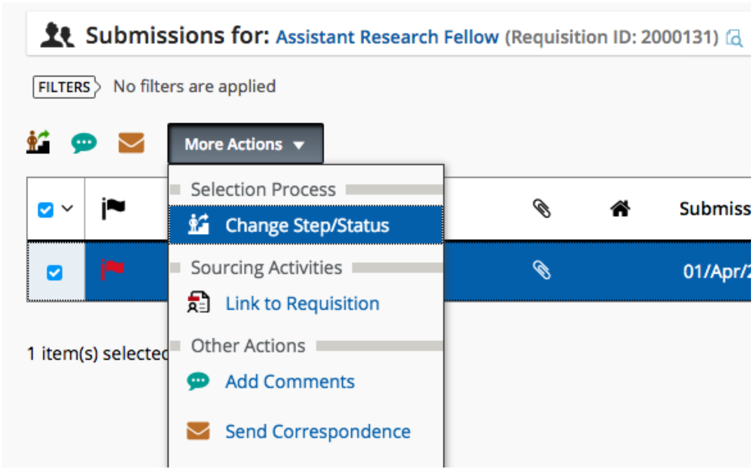


</td></tr>
</table>

Step	Action
6	Click the **Checkbox** next to the type of candidate you would like to see (more than one tick is okay).  In this example you now only see the Internal candidates who are new in the selection process. Spend some time reviewing the options in the Filter lists. 
7	Click the selected **Checkbox(s)** again to deselect the Quick Filter and reveal the full list once more.
8	If you have set multiple quick filters and you would like to clear them all quickly, click the **Clear All** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>Hover your mouse over the candidate you would like to see more information about. You will see more information appear.

Click on the **candidate's name** to see full information.</td></tr>
<tr><td>10</td><td>Select one or more candidates and apply any of the options in the More Actions menu or any of the quick Action Icons.


</td></tr>
<tr><td>11</td><td>End of Example. Cross Reference: Red pg 11</td></tr>
</table>

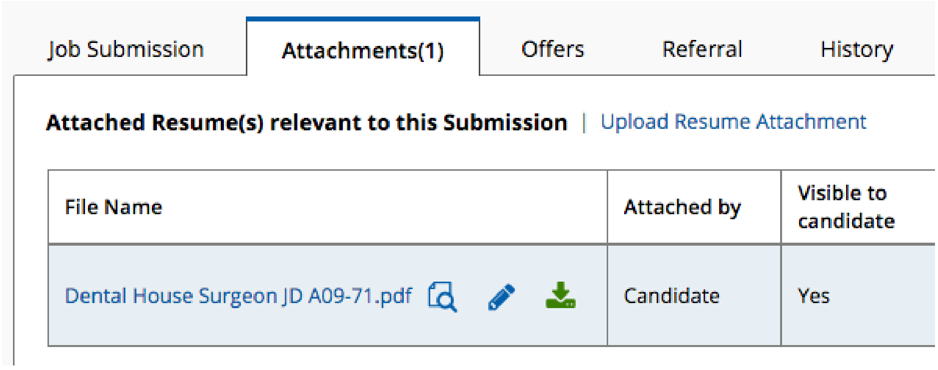
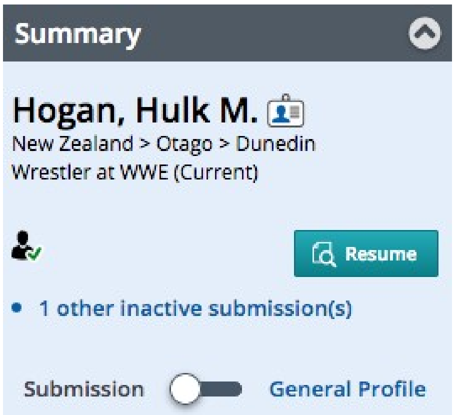
Viewing Candidate Files

To view a Candidate File, click the name of the candidate from the Candidate List. This example walks you through viewing a Candidate File.

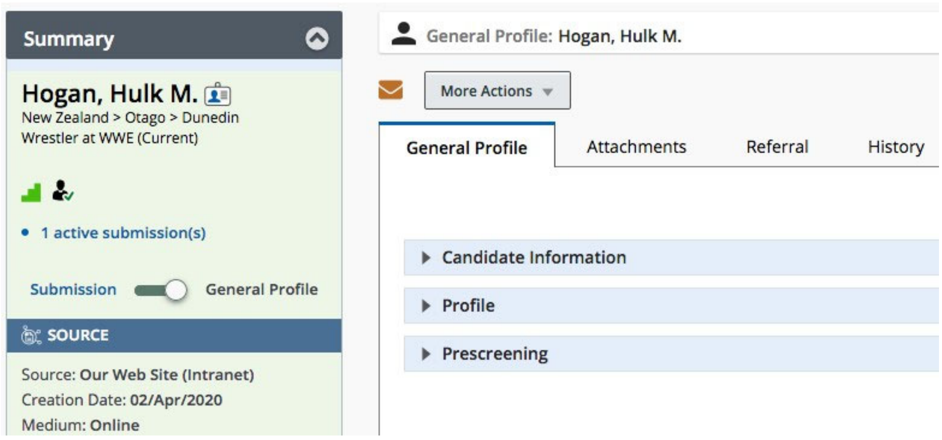
Be aware that you can see two slightly different views of each candidate. There is a General Profile view, and a specific Submission view related to just that requisition.

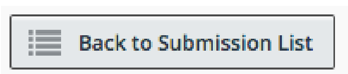
NOTE: The following examples highlight some of the options available, but do not represent a complete procedure.

Step	Action
1	To access a candidate record, click on their **Name** on the candidate list.
2	The record will default to the **Job Submission** tab. Review the details. 
3	To expand each section, click the **Expand icon**.  Click the icon a second time to minimize the section again.
4	Review the remaining tabs. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click on the File Name of any attachments to view the document

</td></tr>
<tr><td>6</td><td>The left-hand panel shows summary details of the candidate's job submission.

</td></tr>
<tr><td>7</td><td>To view the candidate's General Profile, click on the General Profile button in the candidate summary.


This view doesn’t provide any additional details and you should not need to access it. If, however, you accidentally in the general profile view, the next step will show you how to return to the submission view.</td></tr>
</table>

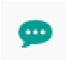
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Review the tabs that hold the details within the General Profile view.

</td></tr>
<tr><td>9</td><td>To return to the Candidate Submission view, click on the Submission button in the candidate summary.

</td></tr>
<tr><td>10</td><td>To return to the candidate list, click on the Back to Submission List button.

</td></tr>
<tr><td>11</td><td>End of Example.</td></tr>
</table>

Adding Comments (from list view)

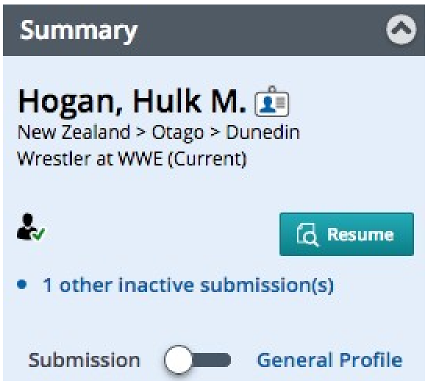
Access the Add Comments action from the action bar on the Candidate List or on the Candidate File.

This example will walk you using the Add Comments action in list view.

Step	Action
1	Select the **checkbox** next to any candidate on the list. 
2	Click the **Add Comments** option on the **Action Bar**. 
3	Enter an appropriate **Comment**.
4	Click the **Apply** button. 
5	End of Example.

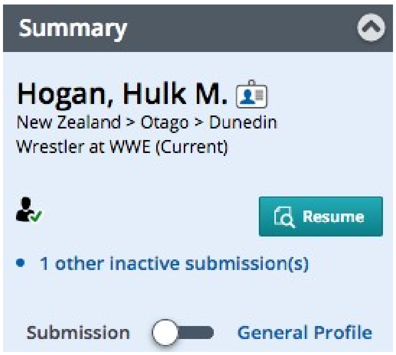
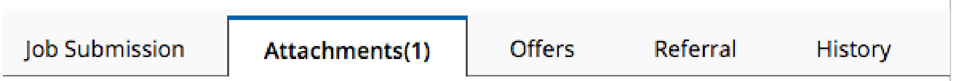
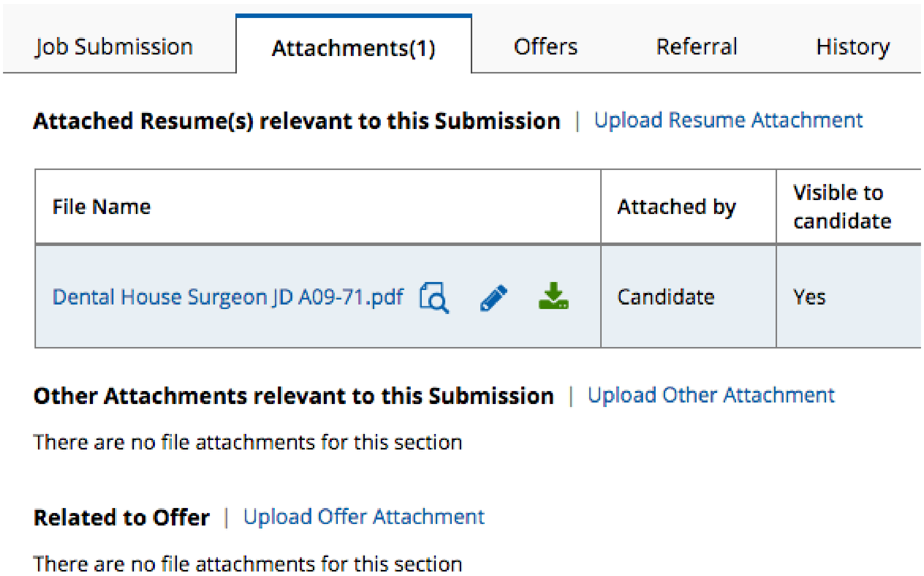
Adding Comments (from candidate file view)

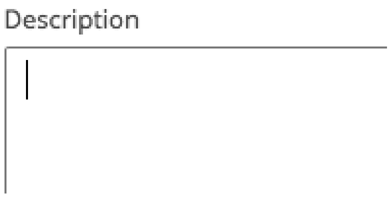
This example will walk you using the Add Comments action from a candidate file.

Step	Action
1	Confirm you are in the Candidate Submission view.  **NOTE:** If you are on the General Profile view - refer to the section on Viewing Candidate files for instruction on switching between the Candidate Submission view and the General Profile view.
2	Click the **Add Comments** option on the **Action Bar**. 
3	Enter an appropriate **Comment**.
4	Click the **Apply** button. 
5	End of Example.

Attaching Files (from candidate file view)

This example will walk you through using the Attach File action from a candidate file.

Step	Action
1	Confirm you are view the Candidate Submission view.  **NOTE:** If you are on the General Profile view - refer to the section on Viewing Candidate files for more information on the differences between the Candidate Submission view and the General Profile view.
2	Click **Attachments** on the Action Bar. 
3	Click on the relevant **Upload Attachment** *(there are 3 options)*. 

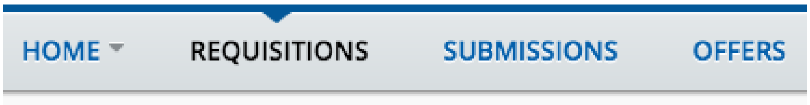
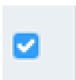
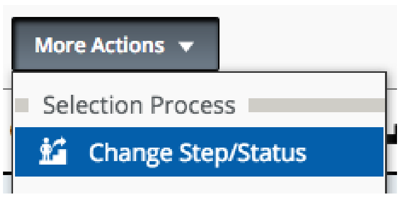
Step	Action
4	Click the **Browse** button and select the required file. 
5	Add a **Comment** in the **Description** box as necessary.  Chose the appropriate **Visibility** option. 
6	Click the **Upload** button. 
7	End of Example.

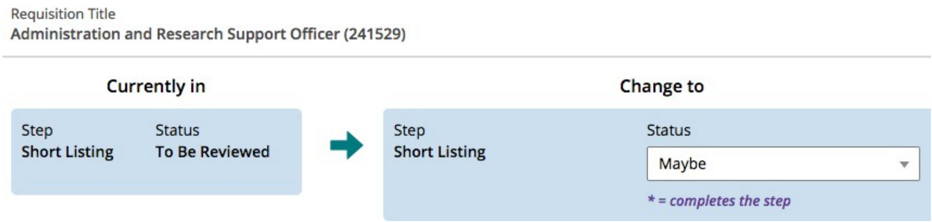
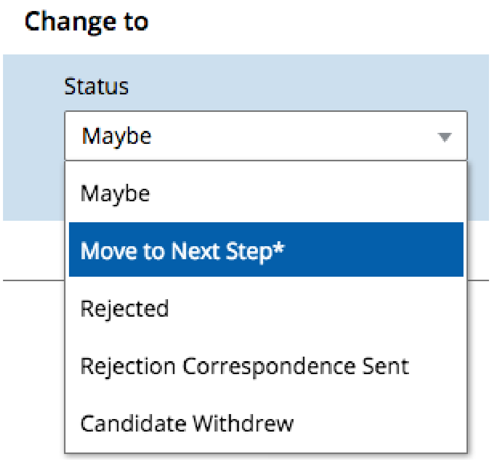
6: Candidate Selection Workflow

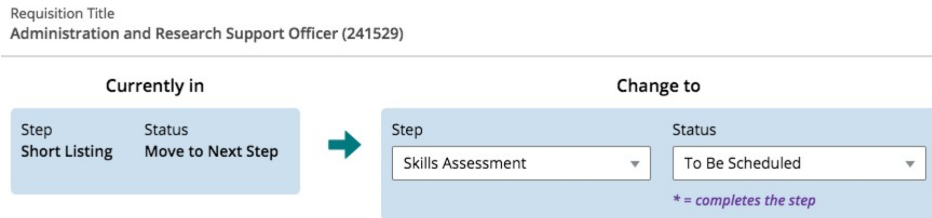
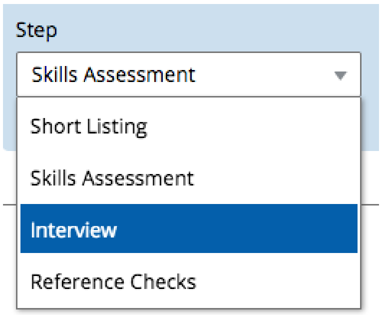
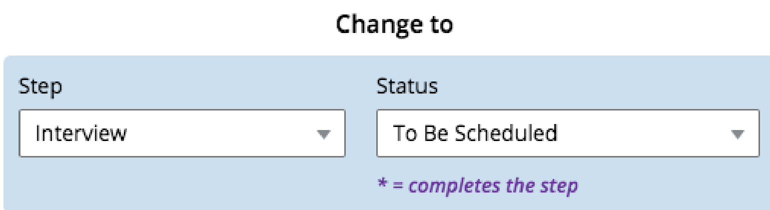
Moving Candidates in the CSW (from list view)

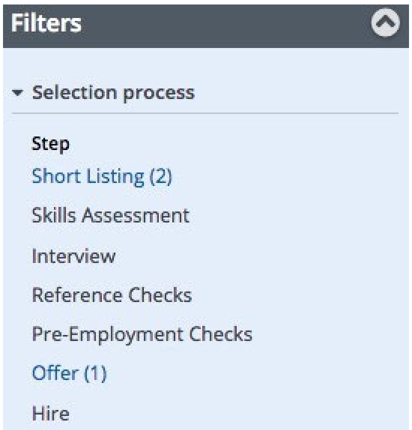
Use the Change Step/status action to move candidates through the hiring process. This action can be accessed from the Candidate list view for one or more candidates or from the Candidate File.

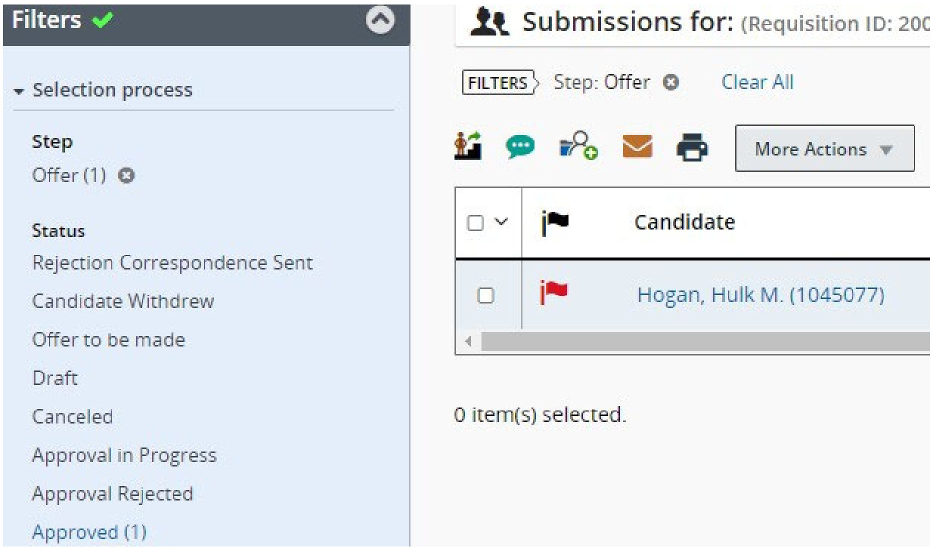
This example will walk you through using the Change Step/status action from the Candidate list view.

Step	Action
1	Click the **Requisitions** link. 
2	Click the **Candidate Number** link on the Requisition List 
3	Notice the Candidate's Step and Status are **Short Listing - To Be Reviewed**.   Select the checkbox next to the candidate you wish to process. 
4	Click the **More Actions** button on the Action Bar and select the **Change Step/Status** option. 

Step	Action
5	Review the default settings. 
6	Click the **New Status** drop down menu and review the possible Status settings. You should apply the most applicable to your situation. In this example we will choose 'Move to Next Step'.  **NOTE:** In this example, the 'Move to Next Step' status will mark the Short Listing Step as complete and (upon save) allow you to access the next step. Completion of steps will always be indicated by an '*'.
7	Click the **Apply and Close** button.  **NOTE:** Use the **Apply and Continue** button if you would like to make another change to the same candidate's Step/Status before closing this window.

Step	Action
8	Notice the candidate's Step and Status is now showing as **Short Listing - Move to Next Step** in the candidate list view. 
9	Select the candidate's checkbox again.
10	Choose Change Step/Status from the **More Actions** button again.
11	Review the default settings. Because the Skills Assessment step is optional you can jump directly to the next Step you will require. 
12	In this example we don't have additional skills assessments, but we would like to schedule an interview with this individual. Click the **New Step** drop down menu and choose **Interview** 
13	Review the default Status. In this example the default is what we need - **To Be Scheduled** 

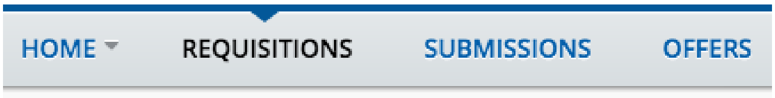
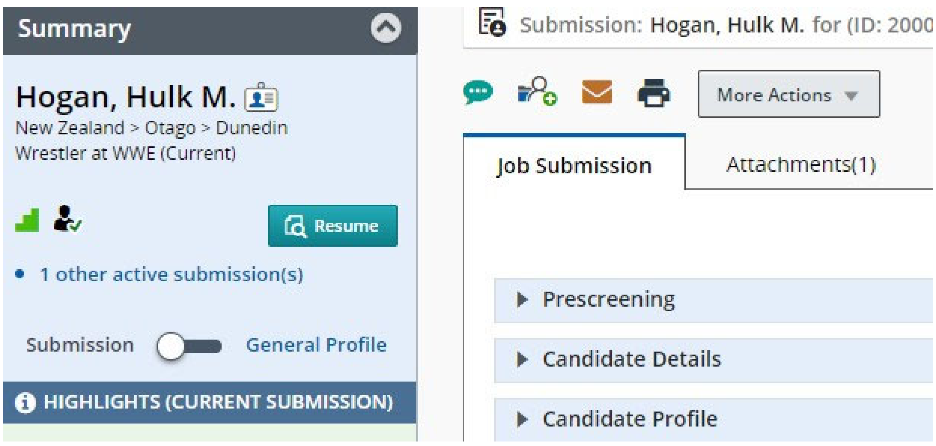
Step	Action
14	Click the **Apply and Close** button. 
15	Notice the candidate's current Step and Status.
16	FILTER HINT Review the **Selection Workflow** panel on the left. You can see that there are 2 candidates in the Short Listing step and 1 candidate in the offer step. For example, to view only the candidate in the offer step, click the offer link. 

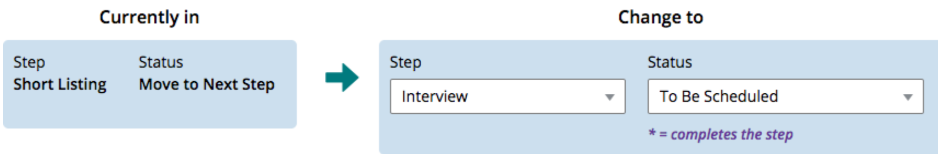
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>17</td><td>The list will refresh, and you will see only that single candidate record. If you had a number of candidates in the Interview step you could further filter by status.


To clear the filter simply click the **x** as indicated above.</td></tr>
<tr><td>18</td><td>End of Example. Cross Reference: Red pg 11</td></tr>
</table>

Moving Candidates in the CSW (from candidate file view)

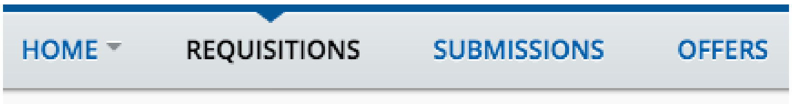
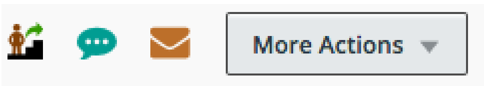
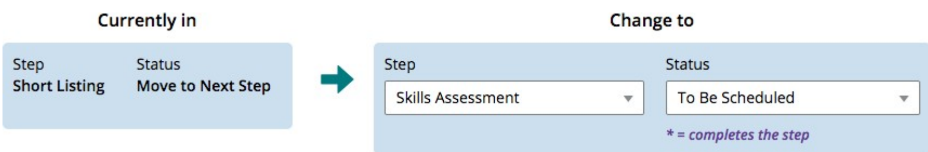
This example will walk you through using the Change Step/status action from the individual Candidate file view.

Step	Action
1	Click the **Requisitions** link. 
2	Click the **Candidate Number** link on the Requisition List 
3	To access a candidate record, click on their **Name** on the candidate list.  The following will appear: 

Step	Action
4	Click the **More Actions** button on the Action Bar and select the **Change Step/Status** option. 
5	Review the default settings. In our example we have contacted the candidate and scheduled an interview so the status is fine.  To review the other statuses available, click the New Status drop down menu.
6	Click the **Apply and Close** button. 
7	You can confirm Step/Status at any time by referring to the highlights panel on the left of the Candidate Submission. 
8	End of Example. Cross Reference: Red pg 11

Moving Candidates in the CSW (using shortcut buttons)

Shortcut buttons can be used from the Candidate File when activated on certain Steps. This example will walk through using shortcut buttons to move a candidate through the Candidate Selection Workflow.

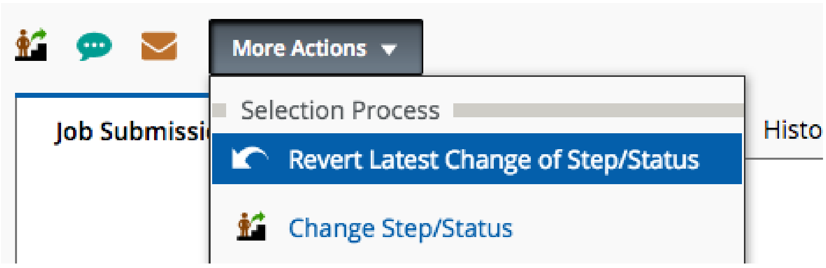
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Requisitions link.
</td></tr>
<tr><td>2</td><td>Click the Candidate Number link on the Requisition List
</td></tr>
<tr><td>3</td><td>To access a candidate record, click on their Name on the candidate list.
</td></tr>
<tr><td>4</td><td>In our example the candidate has had a successful pre-screen and we will use the quick action buttons to advance to the next step.
</td></tr>
<tr><td>5</td><td>Click the Step icon to open the options for moving candidates through selection work flow.
</td></tr>
</table>

Step	Action
6	You can confirm Step/Status at any time by referring to the information panel on the left of the Candidate Submission. 
7	End of Example. Cross Reference: Red pg 11

Undo a Step/Status change

This example will walk you through using the Undo Status Change action to move a candidate back to a previous Step/Status within the Candidate Selection Workflow.

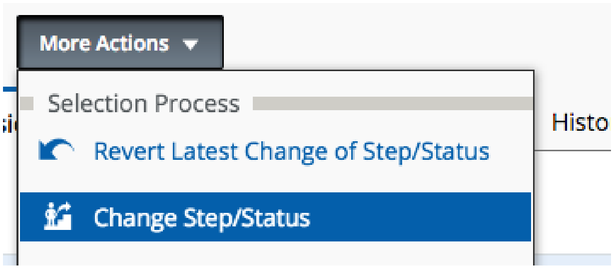
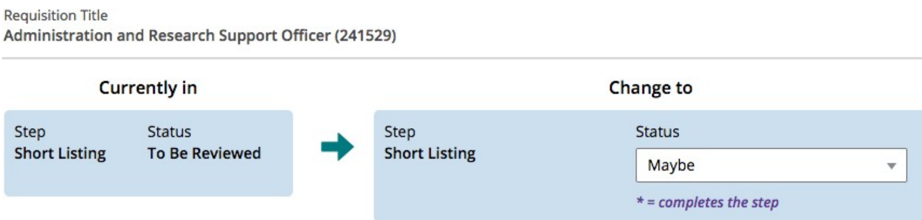
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the More Actions button on the Action Bar and select the Revert Latest Change of Step/Status option.



</td></tr>
<tr><td>2</td><td>The following will appear

NOTE: the comments are mandatory</td></tr>
<tr><td>3</td><td>Click the Revert and Close button.

</td></tr>
</table>

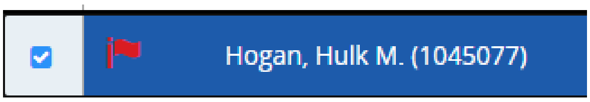
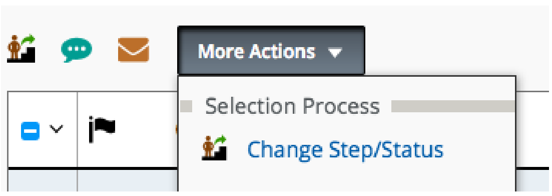
Step	Action
4	Review the candidate's current Step and Status to make sure it is accurate.  **OR**
5	Click the **More Actions** button on the Action Bar and select the **Change of Step/Status** option. 
6	Change the candidate workflow selection step. 
7	Press Apply and Close button. 

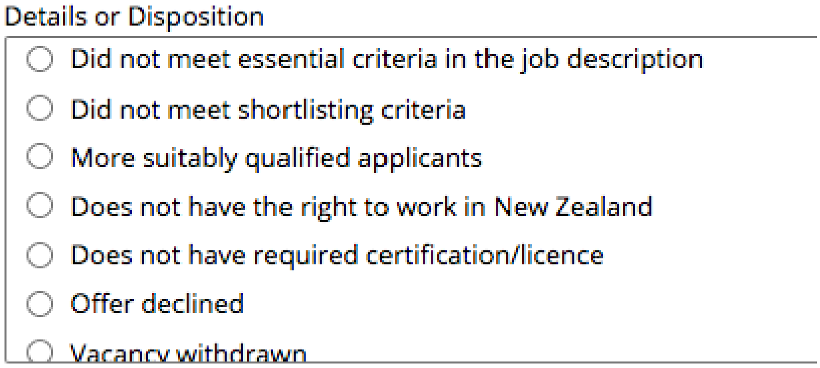
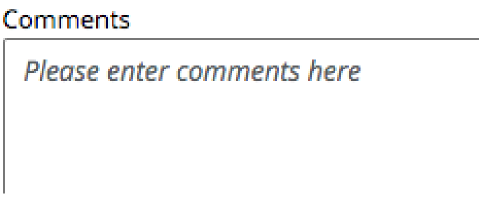
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Review the candidate's current Step and Status to make sure it is accurate.

</td></tr>
<tr><td>9</td><td>End of Example.</td></tr>
</table>

Rejecting a Candidate

You can access the Rejected status from the Change Step/Status screen. This example will walk through rejecting a candidate from the list view.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In our example the candidate does not have the minimum requirements for the position.
Select the checkbox next to the candidate you wish to reject.

</td></tr>
<tr><td>2</td><td>Choose Change Step/Status from the More Actions button.

</td></tr>
</table>

Step	Action
3	Click the **New Status** button and choose the **Rejected** option. 
4	The Rejected status will reveal an extra field where you must specify the reason for rejection. Choose the appropriate **Rejection Reason** button. 
5	Add comments where necessary. 
6	Click the **Apply and Close** button. 
7	Review the candidate's current Step and Status and make sure it has updated to 'Rejected'.
8	Contact the Recruitment Team when you want rejection correspondence sent to candidates who will not be continuing in the selection process.
9	End of Example.

7: Offer Management

Creating an Offer

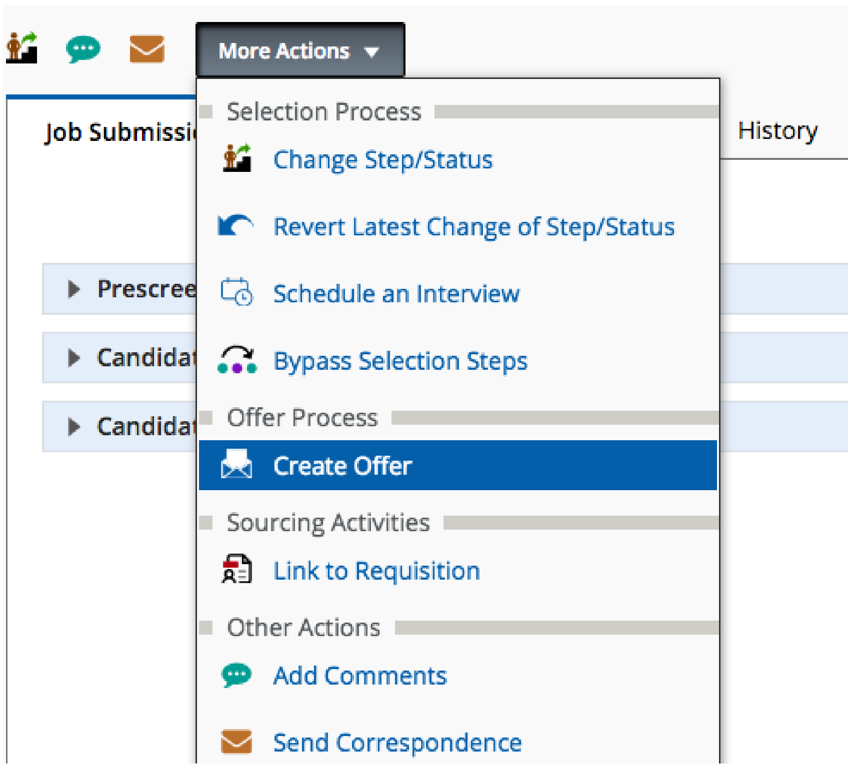
The Create Offer action is available from the More Actions menu when in the Candidate File.

This exercise will walk you through creating an offer.

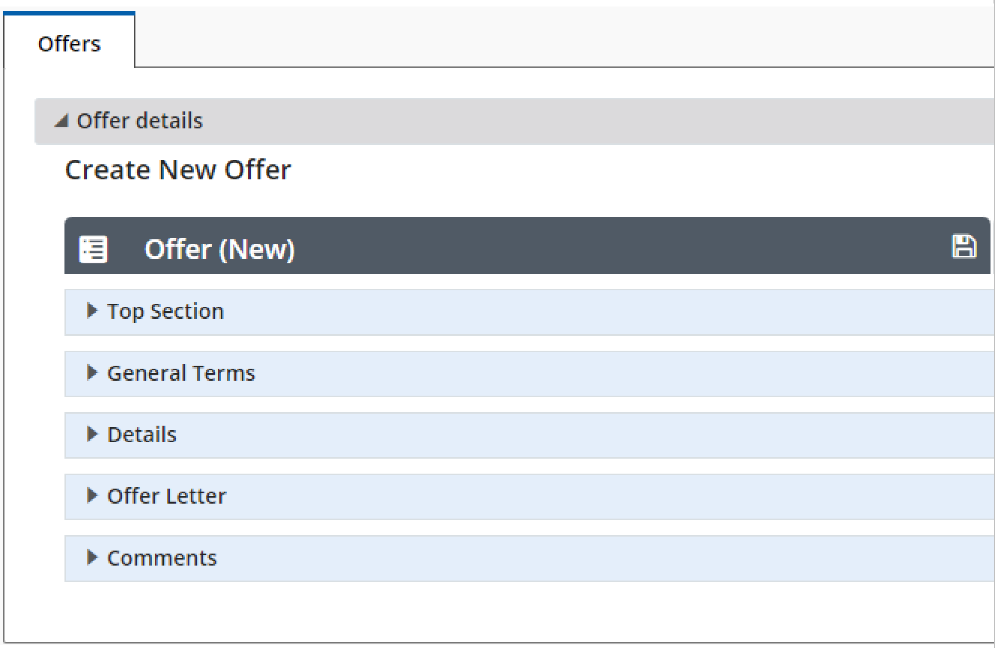
NOTE: You will see the Create Offer option appear in the More Actions menu once a candidate is in the Reference Check - Reference Check Satisfactory step/status. However, you should place a candidate in the **Offer - Offer to be Made** step/status before creating an offer.

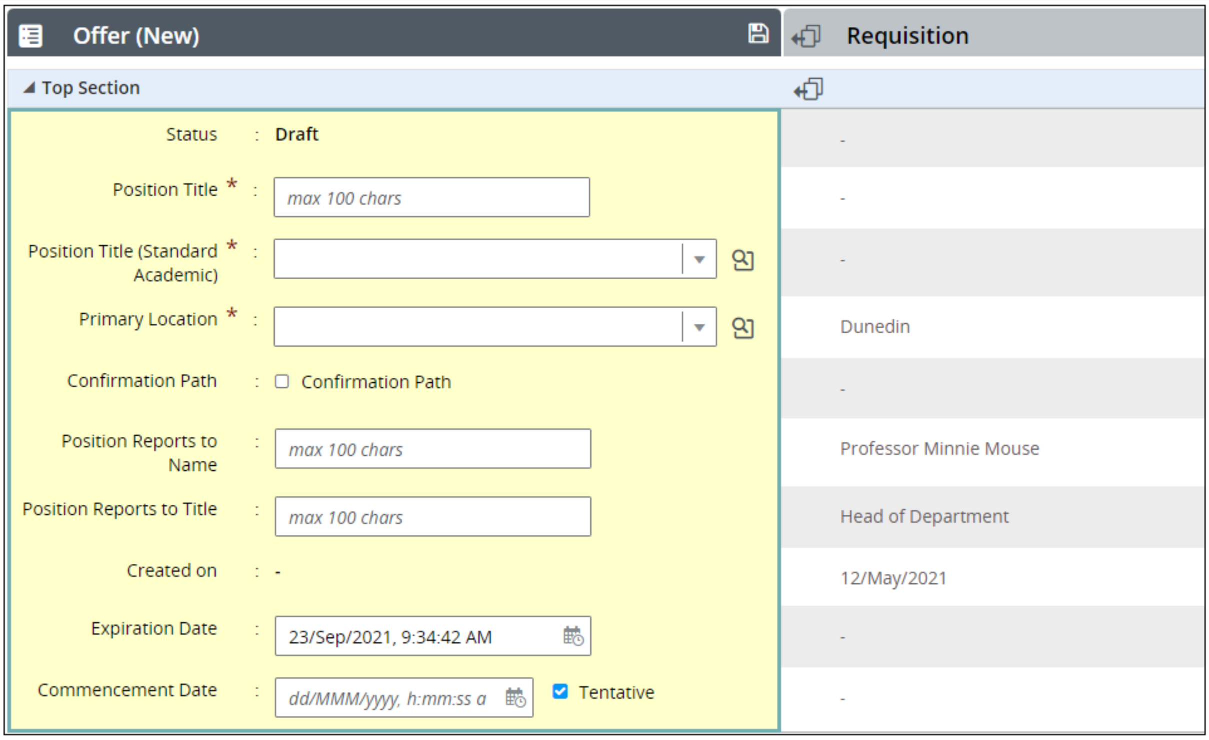
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on the Candidate Name link for the candidate whose current Step and Status is Offer/Offer to be Made.

</td></tr>
<tr><td>2</td><td>Click the More Actions button and choose the Create Offer option.



</td></tr>
</table>

Step	Action
3	Notice that there is now an Offer tab on the Candidate file. The Offer Grid is in five sections however you only need to complete the Top Section, General Terms and Details sections. 



Click on the 

file transfer icon to transfer the information listed to the Offer Grid.

You can edit the transferred information.

Step	Action
1	<u>Status</u> Offers can have these statuses: • Draft • Approval in Progress • Approved • Extended *Note: The offer is date stamped when approved and extended.*
2	<u>Position Title</u> Enter the Position Title as it appears in the Job Description. *Note: For academic offers, the position title should be the standard Academic title (e.g. 'Lecturer' not 'Lecturer in Speciality')*
3	<u>Position Title (Standard Academic)</u> Choose from a list of standardised Position Titles. *Note: This field does not appear in the Offer Grid for Professional staff roles*

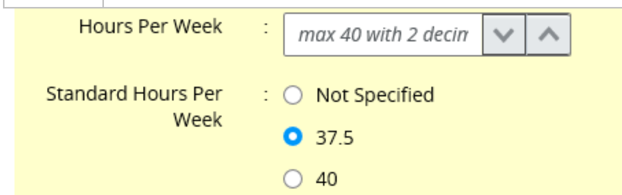
4	Primary Location Choose from a list of locations.
5	Confirmation Path Select for Academic positions if required
6	Reports to Name Name of the new employees direct Manager/Supervisor.
7	Reports to Position Title Position title of the new employees direct Manager/Supervisor.
8	Created on The offer is date stamped when you first save.
9	Expiration Date HR will amend the date when extending the offer. ***Note:*** *Normally 3 business days from the date of the Offer Letter.*
10	Commencement Date Preferred commencement date or select Tentative

General Terms Breakdown

◢ General Terms

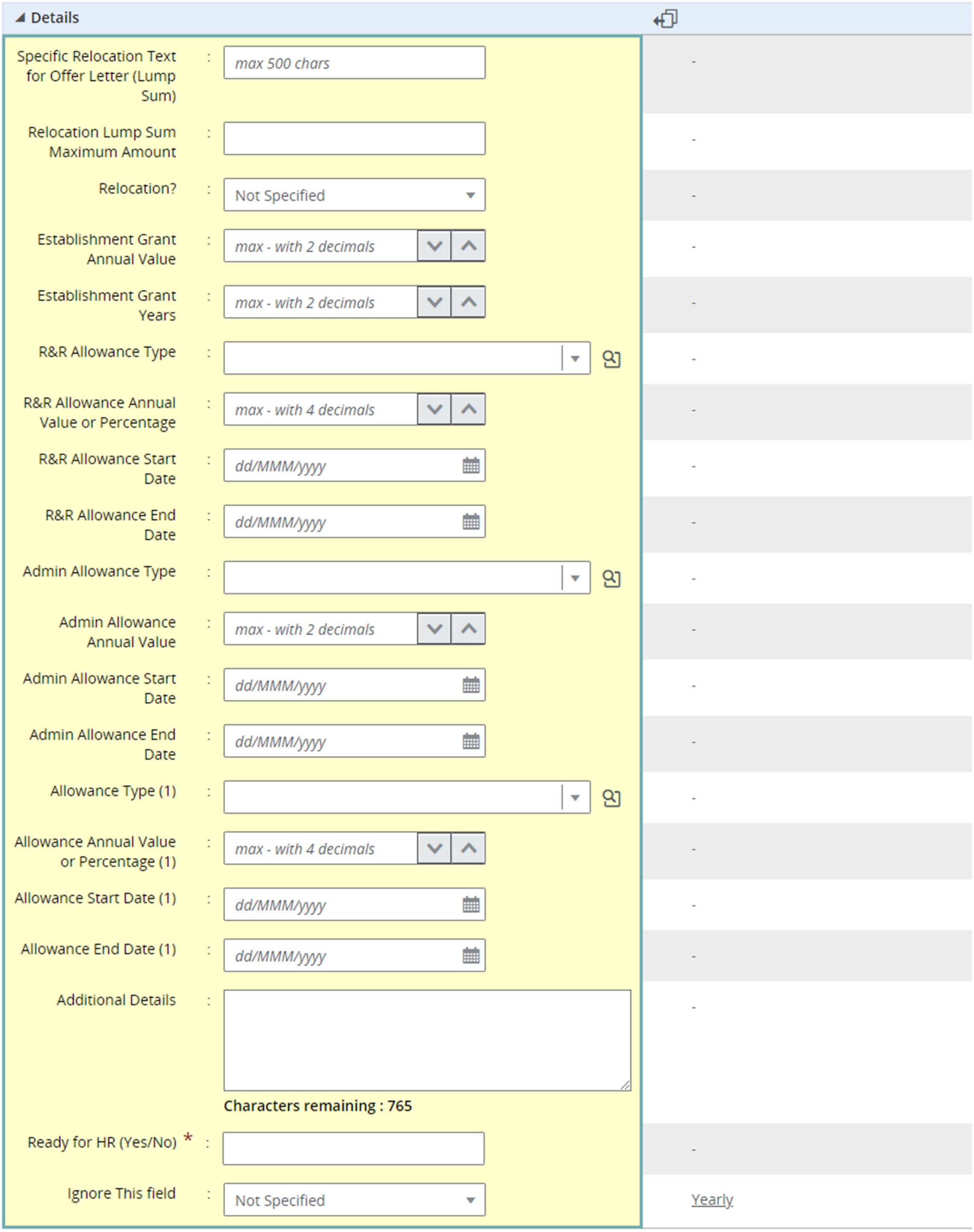
Commencement Type * :		-
Details of Current Position :	max 250 chars	-
Fixed-term End Date :	dd/MMM/yyyy	-
Full-time / Part-time / Variable (Timesheet) * :	○ Not Specified ○ Full-time ○ Part-time ○ Variable (Timesheet)	Variable (Timesheet)
Academic FTE * :	max 1 with 4 decimals	1
Days and Hours of Work (if not standard) :	max 500 chars	-
Semester Time or Academic Year Only :		Semester Time Only (STO)
Salary Level (Classification) * :		-
Salary Step :	max 2 chars	-
Annual Full-time Equivalent Salary :	max - with 4 decimals	-
Pro-rata Salary :	max - with 4 decimals	-
Hourly Rate/Agreed Fee :	max - with 2 decimals	-
Currency * :	New Zealand Dollar (NZD)	New Zealand Dollar (NZD)
Student Status :	○ Not Specified ○ Undergraduate >= 0.6 EFTS ○ Postgraduate >= 0.5 EFTS	-
Employment Agreement :		-
Account Number GL/PL (1) * :	max 25 chars	GL10JHA04211100
Salary Percentage (Account 1) * :	100	100
Account Number GL/PL (2) :	max 25 chars	-
Salary Percentage (Account 2) :	max 99 with 4 decimals	-
Account Number GL/PL (3) :	max 25 chars	-
Salary Percentage (Account 3) :	max 98 with 4 decimals	-
Extra Account Code(s) for Salary :	max 100 chars	cspiers

Step	Action
1	<u>Commencement Type</u> Choose from a list. (e.g. create a new staff record or move an existing staff member to either a new/additional position)
2	<u>Details of Current Position</u> Enter Department and Position information for those currently employed at the University. *Note: used for data quality control.*
3	<u>Fixed Term End Date</u> Complete only if the position is fixed term.
4	<u>Full-time/Part-time/Variable (timesheet)</u> Select the appropriate radio button. *Note: For Variable hours minimum and maximum hours must be provided. This information can be added in the Additional Details field.*
5	<u>Academic FTE (0 – 1)</u> 1 for full-time or an appropriate decimal. (e.g. 0.5, 0.75 or 1) *A small difference for Professional staff* Enter the actual hours to be worked per week in the top box and then specify the number of hours considered full-time for that position. The default is 37. hrs per week as this is standard for most Professional staff role



6	<u>Days and Hours of Work (if not standard)</u> Enter details if required. (e.g.: 8:30am to 5.00pm, Tuesday and Wednesday with one-hour lunch each day **or** Tuesday: 8.30am to 2.30pm, Wednesday: 8.30am to 4.30pm and Friday: 8.30am to 2.30pm)
7	<u>Semester Time Only</u> - Tick if applicable.
8	<u>Salary Level (Classification)</u> Choose the appropriate level for the position.
9	<u>Step (e.g. 06)</u> *(If Applicable)* Enter the step based on the salary scale being offered to the preferred candidate. ***Note:*** *This field needs a leading 0 if less than 10 (e.g. 06)*
10	<u>Annual Full-time Equivalent Salary</u> Annual FTE Salary: Refer to the appropriate Salary table and enter the salary commensurate with the previously entered Level and Step.
11	<u>Pro-rata Salary</u> Pro-rata Salary: (if applicable) Calculate by multiplying the annual FTE Salary by the FTE ratio above. (e.g. $50,000 x 0.75 = $37,500)
12	<u>Hourly Rate/Agreed Fee</u> Hourly Rate-Agreed Fee: *(if applicable)* enter amount.
13	<u>Student Status</u> Select if applicable ***Note:*** *Student status affects the employment agreement offered.*
14	<u>Employment Agreement</u> Choose the applicable agreement. ***Note:*** *If you are unsure, leave it blank and HR will complete upon review.*

15	Account Number GL/PL If the salary is to be paid from a single account, fill the details in the Account 1 area, and set the percentage at 100. If the salary is to be paid from several accounts use Account 2 and Account 3 as needed. In instances where the salary is to be paid from more than three accounts, please note details in the Additional Details field below. If the salary is to be paid from a new account that has not been set up, please: **1. Enter the Department's main salary account** **2. Advise Payroll of the correct account code once it is active** *Note:* the format of the account code is important. It must be entered without spaces, dots or dashes and must be the full account code (15 characters for GL and 19 characters for PL). e.g. **GL10ABC01211100**



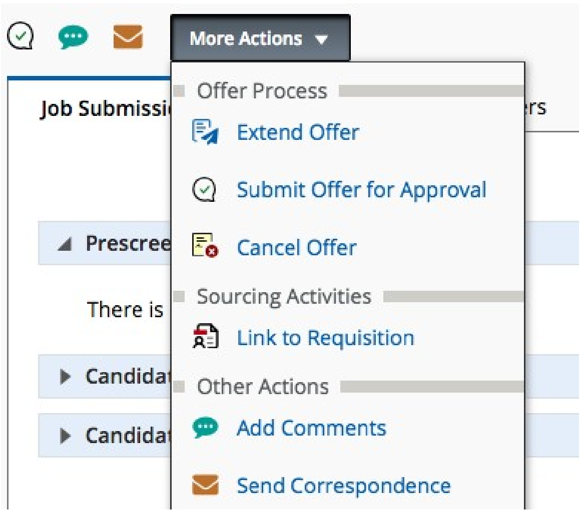
Details

Specific Relocation Text for Offer Letter (Lump Sum) :	max 500 chars	-
Relocation Lump Sum Maximum Amount :		-
Relocation? :	Not Specified	-
Establishment Grant Annual Value :	max - with 2 decimals	-
Establishment Grant Years :	max - with 2 decimals	-
R&R Allowance Type :		-
R&R Allowance Annual Value or Percentage :	max - with 4 decimals	-
R&R Allowance Start Date :	dd/MMM/yyyy	-
R&R Allowance End Date :	dd/MMM/yyyy	-
Admin Allowance Type :		-
Admin Allowance Annual Value :	max - with 2 decimals	-
Admin Allowance Start Date :	dd/MMM/yyyy	-
Admin Allowance End Date :	dd/MMM/yyyy	-
Allowance Type (1) :		-
Allowance Annual Value or Percentage (1) :	max - with 4 decimals	-
Allowance Start Date (1) :	dd/MMM/yyyy	-
Allowance End Date (1) :	dd/MMM/yyyy	-
Additional Details :	Characters remaining : 765	-
Ready for HR (Yes/No) * :		-
Ignore This field :	Not Specified	Yearly

Step	Action
1	<u>Specific Relocation Text for Offer Letter (Lump Sum)</u> If the lump sum option is selected and there are restrictions on what the relocation amount can be used for, enter details here (e.g. flights only).
2	<u>Relocation Lump Sum Maximum Amount</u> If a lump sum Relocation amount has been approved, enter the amount here.
3	<u>Relocation</u> Choose from ‘Full Policy / Lump Sum/ No’
4	<u>Allowances</u> Select as Appropriate
5	<u>Additional Details</u> Include information that maybe use for HR in completing the Letter of Offer, e.g. *For the period 01/10/20 – 31/01/21 will be 0.5 FTE, from 01/02/21 to end of the fixed term will be 1.0 FTE*
6	<u>Ready for HR (Yes/No)</u> When you have completed the offer details to your satisfaction enter ‘Yes’ in this field.
7	Click the **Save and Close** button. 

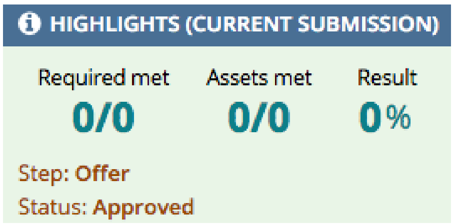
Getting an Offer Approved

When the offer details are complete you must seek approval before HR will begin work on the Offer letter. This example assumes that you are already viewing the candidate file for the individual to whom you would like to offer the position. If not, from the Requisition Home Page choose View Requisitions → then click the number in the Candidate Count field to bring up the candidate list. Finally click the name of the individual in question.

Step	Action
1	Locate the **More Actions** menu in the action bar and click to reveal the drop-down menu. 
2	Click Submit Offer for Approval. 
3	In the dialogue box that appears, confirm that the correct approvers are listed and that they are in the correct order *(1= first approver)*. 
4	If you need to add another approver, locate the **Add Approvers** button and add as necessary. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Enter Comments (this is mandatory to proceed) and click the Submit for Approval button.

</td></tr>
<tr><td>6</td><td>Review the Summary on the left panel. Notice the Status for this requisition is now Offer/Approval in Progress.

</td></tr>
<tr><td>7</td><td>When the approval is complete the Status will update to Offer/Approved.

</td></tr>
<tr><td>8</td><td>End of Example. Cross Reference: Red pg 17</td></tr>
</table>

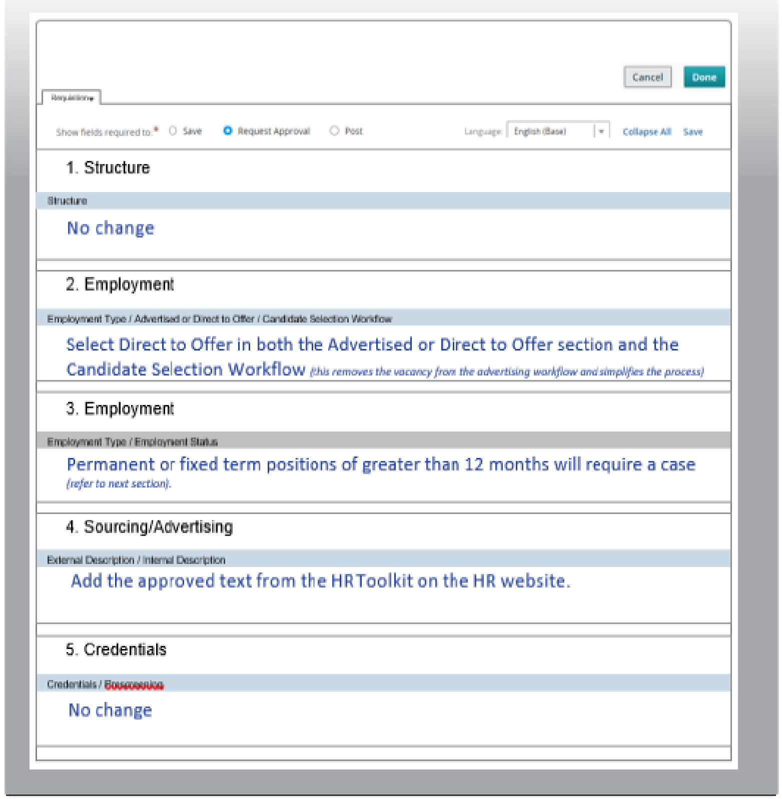
Online Recruiting: Direct to Offer Fact Sheet

What is Direct to Offer?

Direct to offer is essentially an unadvertised position. The process is very similar to the advertised position process but with some notable differences.

Differences in the Requisition

This sheet assumes you already understand the process for completing a requisition for an advertised vacancy. If you do not, please refer online recruiting Reference Guide for assistance.



About the Business Case

Positions with a term of more than 12 months must be advertised. In some circumstances (such as where the candidate is named on a successful research grant application) you can request this be waived.

To do so, include the case for the unadvertised appointment in the Justification for Position (Position Details section) section of the requisition. If the candidate is named on a grant, ensure the grant documentation is attached.

- If the Direct to Offer appointment is for a fixed term of more than 12 months, approval from the HoD / Manager is required.
- If the Direct to Offer appointment is permanent, approval from the Divisional HR Manager / Senior HR Advisor is required.

Accessing the Approved Ad Text

When completing the requisition, you will be asked for advertising wording. Candidates will see this wording under the 'Description' area for the vacancy advertisement.

Insert the following advertisement wording in both the External and Internal sections, regardless of the status of your preferred candidate:

> *"You are invited to apply for this position. Please click on the below 'Apply Online' button and you will be taken through a short application process. You will need to attach a current curriculum vitae and if relevant, please also attach a copy of your current work visa."*

Copy Advertisement Text

There is a link just below the Draft External text box on the requisition page or go to [Direct to Offer]

Remember: You must paste the Advertisement Text in both the Internal and External sections, regardless of your candidate's status.

See OVER

Online Recruiting: Direct to Offer Fact Sheet

Attachments

Please add the Job Description or Information Statement for the position, as well as the candidate's CV.

Approval

1. Create a requisition completing all details mandatory for approval and adding all required attachments
2. From the More Actions menu select Request Approval
3. Adjust your approval chain if required *(remember to add Finance as the first approver)*
4. Click Done

The system will send notifications each time an approver approves.

If the Direct to Offer is for a permanent appointment without advertising the Divisional HR Manager / Senior HR Advisor should be added as an approver after the Finance approver.

NOTE: You will not be able to post this position until final approval has been obtained.

Post Online

To continue the process you must post the position online. Please note, this position will not be publicly visible. You will next provide the selected candidate(s) a link to apply.

1. After approval, open the requisition and select the Sourcing tab
2. Click Add career sections
3. Confirm the default settings (a tick next to Direct to Offer and and Direct to Offer Internal) and click Add / update career sections
4. The end date is set to 5 days (i.e. the posting will be available online for 5 days). Adjust this if necessary
5. Click Save and apply.

Notify the Candidate

There is a simple online form available to help you email the candidate(s) a direct link to the vacancy. **NOTE:** The email sent assumes you have spoken to the candidate(s) prior to sending this email.

Candidate Name:	
Email Address:	
Requisition Number:	
	Send Email

1. Access the Direct to Offer page in the online HR Toolkit and locate the Contacting the Preferred Candidate section. *(see address over)*
2. Enter the Candidate Name, Candidate Email Address and Requisition Number into the online form.
3. Click Send Email

NOTE: There are instructions within the page on sending the email to more than one candidate if there are multiple positions.

Checking Status / Completing Offer Details

Logon to the online system to check if the candidate has applied. Once this is done, the Direct to Offer workflow will move the candidate directly to the Offer to be Made status. Complete the Offer Grid, seeking appropriate approvals, as per the normal process.

See OVER