

# SHORTLISTING CANDIDATES

A GUIDE TO SHORTLISTING CANDIDATES USING  
THE SCHOOL'S E-RECRUITMENT  
SYSTEM.

## 3. Shortlisting Candidates



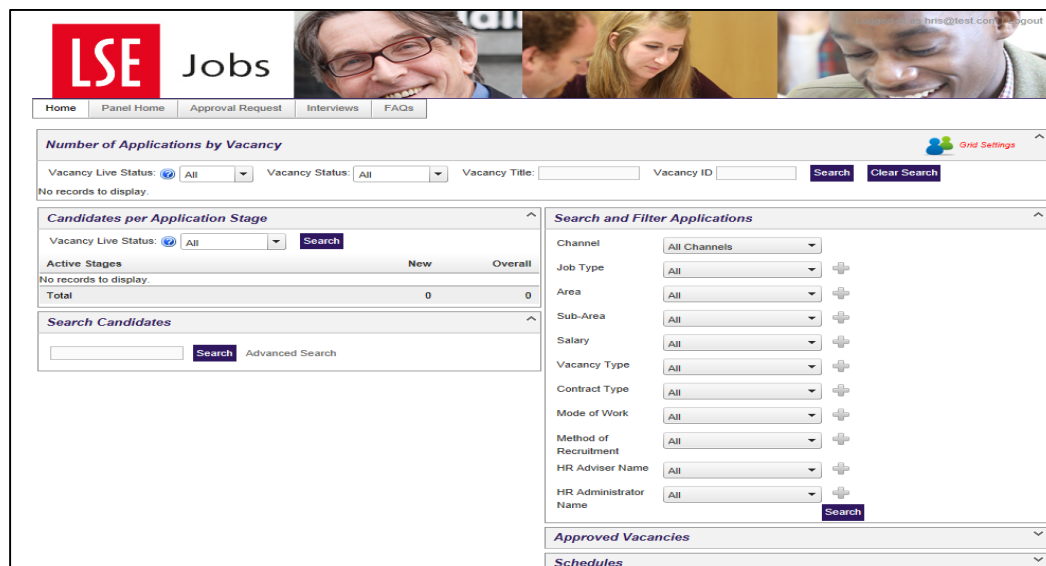
You can commence shortlisting from the moment your first candidate applies for the role you are recruiting for.

Most managers and panels prefer to wait until the job has closed.

This guide explains how to shortlist using the system, whether you're shortlisting in the system or downloading your applications to undertake a paper shortlisting exercise (although the former option is of course the most sustainable).

### Getting Started:

**Step 1.** To begin shortlisting, you will need to log in to the e-Recruitment System and locate the **Panel Home** page.



A list of all vacancies you are linked to (either as the Chair or a Panel Member) will appear in your **Panel Home**.

**Locate the vacancy you wish to shortlist against** and click the **+** to expand and see an overview of candidate applications and their current stage in the recruitment process. In the example below there are 4 applications awaiting shortlisting for the Department Manager vacancy.

Vacancy Name	Live status	Status	Closing date	New	Overall
Department Manager	Live	Shortlisting	09/05/2017	0	4
<b>Stages</b>				<b>New</b>	<b>Overall</b>
New submitted application/shortlisting				0	4
MI Adviser	Not Live	Interview	29/05/2017	0	4
SAP Consultant	Not Live	Offer	25/05/2017	0	3
Case Work Administrator	Not Live	Interview	19/05/2017	0	3

If the vacancy is missing, please speak to your HR Administrator.

## 3. Shortlisting Candidates



**Step 2.** Once you have expanded your view, you should click on **New Submitted application/shortlisting** to be taken to the shortlisting page.

Vacancy Name	Live status	Status	Closing date	New	Overall
Department Manager	Live	Shortlisting	09/06/2017	0	4
<b>Stages</b>				<b>New</b>	<b>Overall</b>
New submitted application/shortlisting				0	4
MI Adviser	Not Live	Interview	29/05/2017	0	4
SAP Consultant	Not Live	Offer	25/05/2017	0	3
Case Work Administrator	Not Live	Interview	19/05/2017	0	3

[Home](#)
[Panel Home](#)
[Approval Request](#)
[Interviews](#)
[FAQs](#)

### Recommendations for vacancy AA Test 1 at application stage PS - New submitted application/shortlisting

**Search and Filter Applications**

	Incomplete	Complete
Candidates the Panel has entered scores against	0	1
Candidates the Panel has recommended a decision on	0	1
Candidates you have entered scores against	1	0
Candidates you have recommended a decision on	1	1

Your saved (not yet submitted) decisions: 0  
Your candidates with no saved or submitted decisions: 1

TOTAL / SHOW ALL CANDIDATES: 1

Search Candidates:  [Search](#) [Clear Search](#)

[Export all scores, recs, etc.](#) [Upload scores, recs, etc.](#)  
[Bulk Recommend Decisions](#)

Print status: [Show All](#) [Show Unprinted](#) [Bulk Print](#)

Candidate	Recommendation	Print	Print Status	Select All
<div> <div> </div> Candidate 7493526 </div>	Manager 5 - yet to review	 Print	 	<input type="checkbox"/>

Page: 1 of 1 [Go](#) Page size: 1 [Change](#) Item 1 to 1 of 1

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**Step 3. Decision Time:** There are two ways to Shortlist your candidates.

- Online using the e-Recruitment system
- By exporting and importing final shortlisting decisions.

Both options are detailed in this guidance.

#### KEY INFORMATION TO NOTE:

**PANEL MEMBER:** your shortlisting scores are submitted to the Chair for final approval. Until approval is granted, no decisions you have made in the system will be actioned.

**CHAIR:** The decisions you input to the system are final and actioned immediately. Therefore, you should not submit your shortlisting decision prior to discussion and agreement with your panel.

**All submitted recommendations by the Chair are final and will result in e-mail notifications being generated to candidates.**

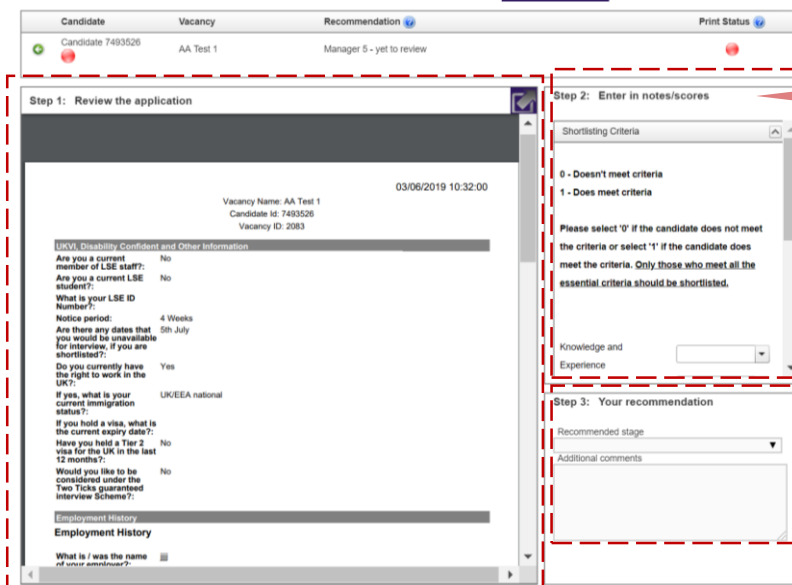
### SHORTLISTING IN THE SYSTEM



**Step 4a. Shortlisting using the e-Recruitment system:** If you wish to shortlist using the 'export' functionality (outside of the system), jump to **Step 4b**, on the following page.

To shortlist within the e-Recruitment system click on the candidate number, the below screen will appear. The screen is **split into three sections, to help make shortlisting easier:**

**Section 1. Review the Application:** This contains the candidate's immigration and compliance details, equal opportunities information, employment history, availability, education and supporting statement.



The screenshot shows a web application interface for candidate review. At the top, there are tabs for 'Candidate', 'Vacancy', 'Recommendation', and 'Print Status'. Below these, the candidate details are listed: 'Candidate 7493526', 'AA Test 1', and 'Manager 5 - yet to review'. The main content area is divided into three sections, each highlighted with a red dashed border and a red arrow pointing to it from the right.   
**Section 1: Review the application** (left) contains a form with various questions and answers related to the candidate's immigration and compliance status, such as 'Are you a current member of LSE staff?', 'Are you a current LSE student?', 'What is your LSE ID Number?', 'Notice period:', 'Are there any dates that you would be unavailable for interview, if you are shortlisted?', 'Do you currently have the right to work in the UK?', 'If yes, what is your current immigration status?', 'If you hold a visa, what is the current expiry date?', 'Have you held a Tier 2 visa for the UK in the last 12 months?', and 'Would you like to be considered under the Two Ticks guaranteed interview Scheme?'.   
**Section 2: Enter in notes/scores** (middle) contains a 'Shortlisting Criteria' section with two options: '0 - Doesn't meet criteria' and '1 - Does meet criteria'. Below this is a text box for 'Please select '0' if the candidate does not meet the criteria or select '1' if the candidate does meet the criteria. Only those who meet all the essential criteria should be shortlisted.' There is also a dropdown menu for 'Knowledge and Experience'.   
**Section 3: Your recommendation** (right) contains a 'Recommended stage' dropdown menu and a text box for 'Additional comments'.

#### Section 2. Enter in notes / scores:

Here you must enter your shortlisting notes and scores against the shortlisting criteria in the person specification.

**Section 3. Your recommendation:** It is here that you, as a panel member or Chair, will make your recommendation as to whether the candidate should be shortlisted for interview. Enter your scores and recommendations and then either Save or Submit.

You can save your scores/notes at any time. If saving, you will need to return to submit your recommendation  
Click Submit when you have finished the review process. This will submit your recommendation and accompanying notes

Save

Submit

**PLEASE NOTE:** The Chair is the ultimate decision maker during shortlisting.

When final decisions are made, any candidates who have the recommendation of "regret after shortlisting" will have an automatic e-mail generated notifying them of this decision.

The information you can review will depend on your role on the vacancy.

**Chair:** You will be able to see all shortlisting recommendations.

**Panel Member:** You will only be able to see your own shortlisting recommendations.

## 3. Shortlisting Candidates

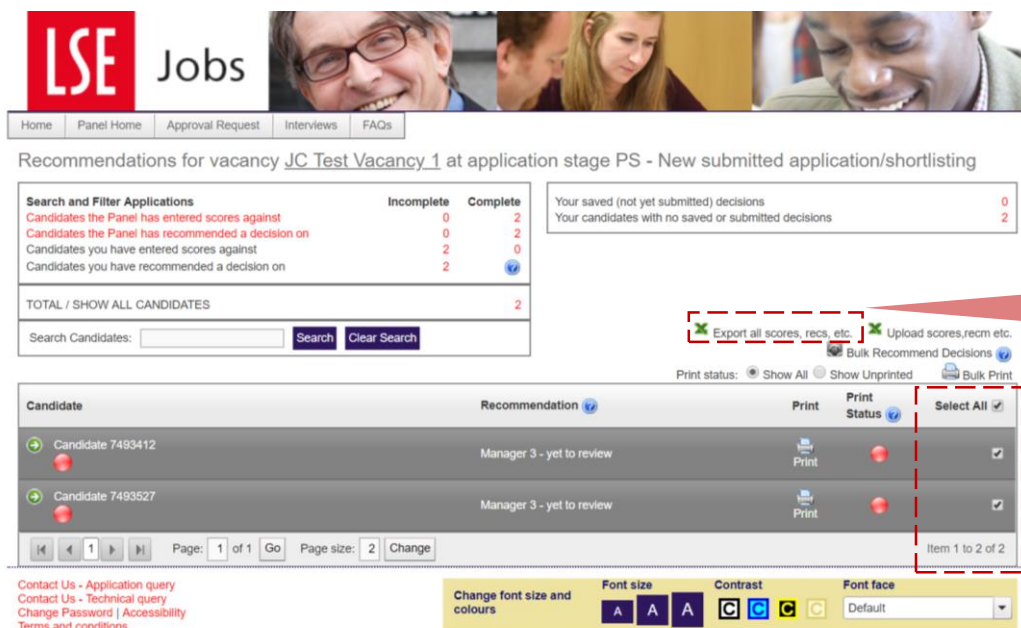
### DOWNLOADING THE SHORTLISTING GRID

#### SHORTLISTING OUTSIDE OF THE SYSTEM



**Step 4b. Downloading & Uploading Shortlisting Grids:** to obtain the candidate information, you should:

1. Check that all applications are visible on your page, ready for downloading (see 'Good to Know' below)
2. Select the candidates (see step 1)
3. Select **Export all scores, recommendations, etc.** (step 2).



The screenshot shows the LSE Jobs system interface. At the top, there's a navigation bar with links: Home, Panel Home, Approval Request, Interviews, FAQs. Below this, the title is "Recommendations for vacancy JC Test Vacancy 1 at application stage PS - New submitted application/shortlisting".

On the left, there's a "Search and Filter Applications" section with a table showing counts for incomplete and complete applications. Below this is a "TOTAL / SHOW ALL CANDIDATES" section with a count of 2.

In the center, there's a table of candidates with columns: Candidate, Recommendation, Print, Print Status, and Select All. Two candidates are listed: Candidate 7493412 and Candidate 7493527, both with a recommendation of "Manager 3 - yet to review".

On the right, there's a "Print status" section with options: Show All, Show Unprinted, Bulk Print. Below this, there's a "Select All" checkbox and a "Print" button.

At the bottom, there's a "Page: 1 of 1 Go" and "Page size: 2 Change" section. Below this, there's a "Change font size and colours" section with options for font size, contrast, and font face.

Two red dashed boxes with callouts are present: one around the "Export all scores, recs, etc." button (callout 2) and another around the "Select All" checkbox (callout 1).

#### GOOD TO KNOW:

Select the candidates that you wish to export.

You can select **ALL** however be aware of how many candidates you have in your shortlist pool.

The page will restrict to 25 candidates and you will therefore need to amend the page size to include **ALL candidates**.

Amend number and select **Change**.



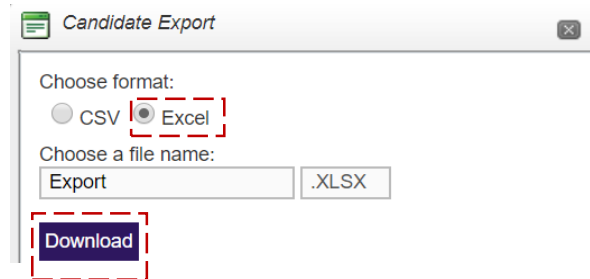
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### DOWNLOADING THE SHORTLISTING GRID

#### SHORTLISTING OUTSIDE OF THE SYSTEM

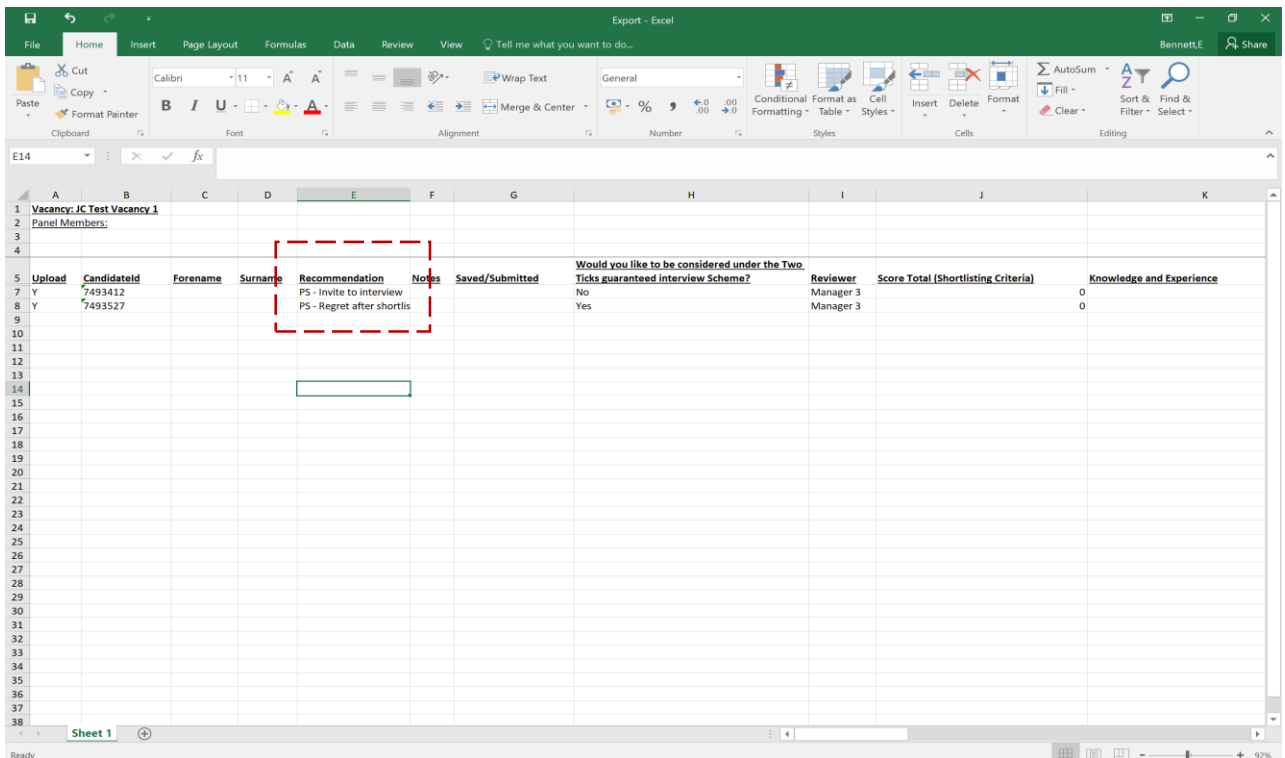


**Step 4c: Downloading the grid to your computer:** When prompted, ensure **Excel** is selected, and click **Download**.



The exported file will contain all candidates, alongside any decisions currently recommended by panel members within the e-Recruitment system.

Once you have inserted the recommendations, the file should be saved in preparation for the upload.



Upload	CandidateId	Forename	Surname	Recommendation	Notes	Saved/Submitted	Would you like to be considered under the Two-Ticks guaranteed interview Scheme?	Reviewer	Score Total (Shortlisting Criteria)	Knowledge and Experience
Y	7493412			PS - Invite to interview			No	Manager 3	0	0
Y	7493527			PS - Regret after shortlis			Yes	Manager 3		

#### GOOD TO KNOW:

When inputting decisions into the shortlisting grid (excel sheet shown above) no changes should be made to the formatting or any other part of the excel sheet. Changes to the sheet will prevent the shortlisting grid from uploading and therefore decisions taken will not be updated in the system.

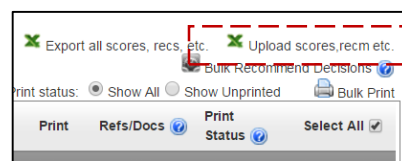
### 3. Shortlisting Candidates

## UPLOADING YOUR SHORTLISTING GRID



To upload your completed shortlisting grid in the excel file format, you will now need to return to the system and select **Upload scores, recommendations, etc.**

Please note: **only** the Chair and/or the Vacancy Manager can do this.



You will then see the below pop-up screen appear. You should select **choose file** to upload the excel file containing your shortlisting decision.

Once you have selected your file, you should click **update**.

The system will notify you if the import has been successful. Refresh your page and the candidates will have the scores and recommendations associated to them. Exit and close the box to review the outcome within **Panel Home**.

Import manual scores and recommendations

Files you upload here should have a first row of column headings, immediately followed by one row per application that you wish to update.  
If you wish to update "Manual Scoring" scores then the new values should be in columns whose headers are in **Section.Item** format, where **Section** is the title of the manual scoring form section (tab) and **Item** is the label of the item within that section.

Please upload a csv or xlsx file.

Choose file

Export.xlsx

Send email

☐

Update

File Name	# Rows Imported	Upload Date	By Whom
No records to display.			

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**NOTE:** No amendments should be made to the file e.g. sorting etc. other than inputting scores and recommendations, **changes will prevent a successful upload.**

**PLEASE NOTE:** All Chair decisions will progress the candidate and therefore emails informing candidates that their application has been unsuccessful will automatically be sent out. Those candidates who have been invited to interview will not receive an email until the interview schedule has been published, but their status on the system will change to 'invite to interview'.