### Document Change Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Authors</th>
<th>Summary of Changes</th>
</tr>
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<tbody>
<tr>
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<td>PageUp People</td>
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<td>Allan Cunliffe</td>
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<td>Allan Cunliffe</td>
<td>Added separate procedure for Non-advertised Appointments and Variations to Appointments and updated process flow diagram. Edits to Mail Matcher section – removed irrelevant mail matcher options.</td>
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<td>Minor edits to Events procedure, including explanation of Owner field. Added definition of Owner to Glossary. Updated Offer procedure to include instructions on saving offer without commencing approval workflow. Added instructions on editing approvers where approver is absent – for Job Card and Offer Card. Added section on viewing and editing reports for Recruitment Selection Support users. Added section on processing new starters and the New Starters Report.</td>
</tr>
<tr>
<td>5.1</td>
<td>6/3/2015</td>
<td>Allan Cunliffe</td>
<td>Event Bookings – how to review bookings</td>
</tr>
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<td>John Frezza</td>
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Introduction

The purpose of this Recruitment Process Flow and Guide is to detail the process for sourcing, selecting and hiring employees using PageUp which has been branded and will be referred to as ANU Recruit by the Australian National University (ANU).

This guide is designed mainly for ANU Recruitment Selection Support in the Colleges and Divisions. It outlines the recruitment process steps for each individual involved in recruitment activities and decisions, including hiring managers, recruiters, Selection Committee Members, Recruitment and Appointments, and other parties participating in the recruitment process.

For each recruitment step, relevant training and support materials are available to assist new users complete the actions required within the system.

ANU Recruit Process

At a simplistic level, the diagram below outlines the activity that takes place within ANU Recruit. A more detailed process flow specific to ANU’s unique system configuration is provided on the following pages.

- **JOB**
  - Raise job in ANU Recruit with a fully completed job card
  - Request to advertise approved by relevant delegates

- **SOURCE**
  - Source Applicants from talent search in ANU Recruit
  - Advertise job internally and externally

- **APPLY**
  - Applicants apply for job
  - Applicants files are created

- **MANAGE**
  - Manage applications
  - Update applicant information
  - Interview and select applicants
  - Progress applicants through the recruitment process

- **CLOSE**
  - Make offer of employment
  - Close the job in ANU Recruit

- **REPORT**
  - Business reporting outputs generated in ANU Recruit
ANU Recruit Overview

ANU Recruit allows different users to have different views into the recruitment system.

Applicants

Applicants can engage with the system through the ANU careers website which lists ANU jobs, and also provides information about the University. Applicants may also apply directly via advertisements on UniJobs or Seek.

Recruitment Selection Support

Recruiters are presented with an administration dashboard to show their current jobs and applicants, and the activities they need to complete for their allocated jobs.

Hiring Managers

The Hiring Manager Dashboard outlines the different steps in the recruitment process for hiring managers to action. The dashboard provides an easy visual prompt for outstanding actions in each step of the process, and quick access to applicant pages.
Getting Started

Pop-Ups

Ensure that you have disabled the Pop-up Blocker on your web browser. For more information go to: http://itservices.anu.edu.au/online-services/enterprise-systems/frequently-asked-questions/

Setting Bookmarks for ANU Recruit

The method for setting bookmarks varies on your browser. The following instructions cover Firefox, Internet Explorer and Google Chrome.

Firefox

2. Right-click the ANU Recruit Login button and select Bookmark this Link.
3. Optional. Edit the Name and Folder details.
4. Click Save.
Internet Explorer

2. Right-click the ANU Recruit Login button and select Add to Favorites.

3. Optional. Edit the Name and Folder details.

4. Click Add.

Google Chrome

2. Drag the button to your toolbar.

**Result:** The link will show in the toolbar as ANU Recruit Login

3. Optional. To edit the link properties, right-click the link and select Edit.
**Logging In**


Click the Login button:

![ANU Recruit Login](image)

Login with your UniID and HORUS password.

You will be presented with Recruitment Dashboard.

**The Recruitment Dashboard**

The Recruitment Dashboard is the home page for recruiters. It shows a summary of current recruitment activities. There are a number of important features to highlight:

1. **Teams and Users**: Displays your own name and any other teams or users you have access to. You can view the jobs of other recruiters in your team by clicking on their name.

2. **Current Jobs**: Shows jobs you have listed and their status (i.e. Pending, Active). Click on the ‘+’ symbol to view the Position title, Job number (Automatically created), number of applicants and number of Positions available.

3. **Tasks**: You can add, edit or delete tasks. **NOTE**: Black means it is in the future, Red means it is due today or overdue).

4. **Main menu**: These are your Main Menu options. Click on the menu option to navigate to that screen. You can also use the Tabs in the top left corner of the screen (hover over them to see the function).

5. **Help**: Hover your mouse over Help to access “Live support”, “Knowledge portal” and the “Support centre”.

6. **Print icon**: You can use this on any page within ANU Recruit where this icon displays.
7. **Recent items**: Displays the last 20 Applicants and/or jobs viewed.

8. **Charts**: Current positions and Positions per week graphs display based on information from **Current Jobs**.
   **NOTE**: this is read only and cannot be changed.

9. **“i” icon**: Clicking in the "i" icon shows you a summary of the job including job number, College/Division, Location, Status, Owner, status and number of applicants, Sourcing channels and any job notes.

**Key Principles for Using ANU Recruit**

When using ANU Recruit, it is important to be mindful of the following key principles to ensure optimal results are achieved for both the recruitment team and the broader University. This will improve the accuracy of reporting, enhance candidate care and management, improve efficiency and streamline recruitment processes.

- Complete the job card in full and correctly.
- Update the Job Status in a timely manner and in line with your recruitment process flow.
- Update the applicant’s status in a timely manner and in accordance with the recruitment process flow.
- When you have completed the recruitment close down the job card.
- Do not re-open cancelled, withdrawn or filled jobs as this will impact reporting and approval processes.
- Update ANU Recruit daily with activity that has occurred.
The Knowledge Portal

For each step of the recruitment process, relevant support materials and reference guides are available to assist the user to complete the required action in the system. These materials are located on the PageUp Knowledge Portal. The Knowledge Portal provides product information, useful hints and tips for using the system and a comprehensive library of training and support materials.

The Knowledge Portal can be accessed online through the ANU Recruit system. All materials on the Knowledge Portal are maintained and updated by PageUp to ensure that they provide the most up-to-date and accurate system information.

Instructions for accessing the Knowledge Portal

1. Login to your ANU Recruit account.

2. Hover your mouse over the Help icon on the menu bar at the top right-hand side of the screen. A drop-down menu will appear. Click the option Knowledge portal.

3. You will be taken directly to the Knowledge Portal.

- **Training Materials and Resources** are located under the Home menu
- **The Recruitment** menu will direct you to additional information relating to all aspects of ANU Recruit
The ANU Recruit Support Process

There is always someone to help. If you encounter a problem or have a query regarding ANU Recruit, the following support structure and process will help you quickly and easily resolve the issue.

1. **Other Users**
   Your team members will usually be able to answer most of your queries.

2. **Knowledge Portal**
   Search the Knowledge Portal, which contains answers to most common queries.

3. **ANU Super Users**
   Super Users are able to control and action configuration changes if required.

4. **PageUp Support Case**
   If the query still cannot be resolved, a Super User can raise a support case with PageUp. Support can be accessed anytime through a number of different channels:
   - Online Chat: select *Live Support* located in the help menu on your ANU Recruit dashboard
   - Phone: 1300 30 60 41
   - Email: support@pageuppeople.com

**Support cases should only be raised by Super Users**, so they are able to identify common queries, system issues and monitor for resolution or escalation if necessary.

In accordance with the Service Level Agreement, PageUp will respond to all support cases within a maximum timeframe of 1 business day and provide status updated every week (95% of the time) until resolution identified.

For more information about PageUp Support, visit the Support page on the Knowledge Portal, located under the Home tab.
ANU Cross Functional Recruitment Process Flow

Advertised Appointments

Recruitment Process Flow – Create, Approve and Source Job
Non-advertised Appointments and Variations to Appointments

- Applicant
- Access applicant portal
- Offer email
- Offer Workflow message
- Offer accepted/declined

- ANU Delegate
- Recruitment Selection Support
- Hiring Manager
- Create job card (w/o advertisement)
- Check applicant record is in ANU Recruit
- Add to job card
- Create applicant in ANU Recruit
- Create offer card
- Review offer details and action
- Change applicant status to Online Offer Made
- Offer Workflow message
- Offer accepted/declined
- Review offer details and action
- Offer Daily Offers Approved report

- Applicant
- Review offer details and action
- Action offer

- Hiring Manager
- Create offer card
- Review offer details and action
ANU Recruit

Quick Reference Guides
## Dashboard – for Recruiters

### Accessing PageUp People

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<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Go to the PageUp People website</strong></td>
<td></td>
</tr>
<tr>
<td>Navigate to: <a href="http://hr.anu.edu.au/employment-at-anu/recruitment-toolkit">http://hr.anu.edu.au/employment-at-anu/recruitment-toolkit</a></td>
<td>TIP: Adding this address as a favourite will save you time in the future.</td>
</tr>
<tr>
<td><strong>STEP 2: PageUp People Login</strong></td>
<td>ANU Recruit Login</td>
</tr>
<tr>
<td>Click the <strong>ANU Recruit Login</strong> button at the top of the page</td>
<td>ANU Recruit Login</td>
</tr>
<tr>
<td><strong>STEP 3: Login Box</strong></td>
<td>Authentication Required</td>
</tr>
<tr>
<td>Enter your UniID and HORUS password. Click OK.</td>
<td>Authentication Required</td>
</tr>
<tr>
<td><strong>ANU Recruit Dashboard</strong></td>
<td>ANU Recruit Dashboard</td>
</tr>
<tr>
<td>The first page that you will see will be the Dashboard page. Your view may be different depending on your level of access. All available functions are within the menu on the right-hand side of the screen.</td>
<td>ANU Recruit Dashboard</td>
</tr>
</tbody>
</table>
# Creating a new task

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>STEP 1: Select New task</td>
<td><img src="image" alt="Dashboard" /></td>
</tr>
<tr>
<td>From the right hand main menu, click <strong>New task</strong>. The Tasks section of your Dashboard will display any tasks you have. You can also create a task from the Tasks section.</td>
<td><img src="image" alt="New task" /></td>
</tr>
</tbody>
</table>

| STEP 2: Create New task | ![New task](image) |
| You will be presented with the New task window. Create your task by completing the fields. | ![Dashboard](image) |
| **Task Name:** This will display on your Dashboard in the Task section. | ![Dashboard](image) |
| **Task description:** Use this section to enter a further description for your task. | ![Dashboard](image) |
| **Due date:** Enter a due date or click on the Calendar icon to select a due date. NOTE: Tasks with a due date for the days date will appear on your Dashboard as red. | ![Dashboard](image) |
| **Job** (optional): To relate this task to an existing job request, you can enter a job number. | ![Dashboard](image) |
| **Assignee:** You will be the assignee of the task and it will appear on your Dashboard. Select Another user or The owner of the selected job to assign and display the task on another users Dashboard. | ![Dashboard](image) |
| **Importance:** Select the importance of the task. Task with a High importance will be marked with '!' Tasks with a Low importance will be marked with ''. | ![Dashboard](image) |
| **Amount completed:** Use this to enter if the task is complete as a percentage. | ![Dashboard](image) |
| Click Save & Exit to return to the Dashboard. You task will appear in the Tasks section. | ![Dashboard](image) |
**STEP 3: View and Edit a task.**

To view the details and/or Edit a task, click on the ‘Edit’ icon.

The Edit task window will display. Make changes if required and click Save & Exit.

To Delete a task from your Dashboard, click ‘X’. The task will be deleted.

**STEP 4: View assigned tasks**

Click on Assigned tasks to view tasks you have assigned to other users.

Click the edit icon to view the details of the task.

To return to your Tasks, click Your tasks.
Creating a new job – for Hiring Managers / Nominees

Hiring Managers (i.e. supervisors) will create new jobs. However, you may be asked to assist as a nominee. To be able to help when a job card is in a draft status your name will have to be recorded in the nominee field at the top of the job card.

NOTE: Before creating a new job please ensure you have obtained/prepared the following:

- Position number (if known). If a new position - please leave blank
- Position description (from the Online Library)
- List of relevant approvers for the role

Creating a new job

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Create a new Job</strong></td>
<td><img src="image" alt="NEW JOB" /></td>
</tr>
<tr>
<td>Click <strong>New job</strong> from the right hand navigation menu or the <strong>New Job</strong> bubble.</td>
<td></td>
</tr>
<tr>
<td>You will be presented with the Select a job template page.</td>
<td></td>
</tr>
<tr>
<td>In the <strong>Position</strong> field, enter the position number you are advertising for. If you do not know this position number - this can be obtained via HORUS (or you can ask a Nominee from your area for assistance).</td>
<td></td>
</tr>
<tr>
<td>In the Template field, select the template for your College or Division appropriate template and then click <strong>Next</strong>.</td>
<td></td>
</tr>
<tr>
<td>You will then be taken to the Job card.</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** Most of the information about the job will be entered on the **Position info** tab. Ensure you complete all mandatory fields (these are marked with an asterisk*).
STEP 2: Position Info tab

Most of the information about the job will be entered on the Position info tab.

Some fields will be prepopulated with information which is linked to the position number.

Enter all required information. Mandatory fields marked with an asterisk.*

Nominee

If someone is helping with this job request, enter their name in the Nominee field and save the Job Card as a draft (this will give them access to enter information). You do not have to have a nominee.

NOTE: You will need to inform the nominee that a draft requisition has been created.

If you are a nominee for a Hiring Manager please add your name into the nominee field and enter the Hiring Manager’s name in Section 5.

Method of Recruitment

Select the Recruitment process and complete the relevant remaining sections i.e.:

• For Appointment with advertisement - complete Sections 2 and 5.
• For Appointment without advertisement (New appointment) - complete Sections 3 and 5.
• For Appointment without advertisement (Variation to Existing Appointment) - complete Sections 4 and 5.

Validation & Approval

Select the relevant approval process and enter the names of each approver in the fields provided.

NOTE: Once the job is submitted an email will be sent to the first approver. The Hiring Manager and Recruitment Selection Support will receive email notification once all approvers have approved the job.

You will need to enter the name of the recruiter who is assisting in the Recruitment Selection Support field on the job card. If you do not know who this person is, insert HR Division in this field. They will be notified and allocate the correct person to the job.
**STEP 3: Using the Notes tab**
The Notes tab is a great way to record extra information about the job.
You can record notes for yourself and also send emails about the job from the Notes tab.

**STEP 4: Sourcing the job**
**NOTE:** Only the Recruitment & Appointments team have access to this tab.
Access the Sourcing tab.
Click Add sourcing channels.
Choose the first required sourcing channel by locating it in the list (on the left of the screen) and clicking on the title. Once selected, the sourcing channel will be highlighted in blue.
Enter the opening and closing dates. Check and edit (if necessary) the text in the Summary and Description fields.
Select the appropriate application form from the drop-down list, and appropriate job search categories (if applicable). Complete all other mandatory fields.
Follow this process for all required sourcing channels and click Save.
For more detail, refer to the procedure: Sourcing a Job

**STEP 5: Using the Documents tab**
Position Description including Selection Criteria and Pre-Employment Work Environment Report must be uploaded via the Documents tab.
To select and attach a Position Description from the online library, select document from a file from the drop-down list and search for the applicable Position Description. A Pre-Employment Work Environment Report should also be attached. It is optional to attach other supporting documentation.
**NOTE:** The Position Description MUST be attached before the job can be approved and advertised.

**STEP 6: Saving the job**
When all job details have been entered:
- to complete the job at a later stage, save your job by clicking Save a Draft
• to submit the job for approval, either click Submit or Submit & Exit.

**STEP 7: Viewing a job**

Click **Manage jobs** on the right hand navigation menu. You can choose to view all jobs, or filter the page to only display certain jobs (note that you will only see jobs that relate to the team/s that you have access to).

You can filter jobs by status by selecting a status from the Status drop-down list on the left-hand side of the page. For example, you may want to view all jobs in an ‘Offer’ status.

Click **Show other search criteria** to view other criteria by which you can filter your search on.

You may choose to search for jobs by job number, recruiter, or any other available criteria.

Click the **Search** button on the right-hand side of the page.

Identify the job that you would like to view, and click **Edit**.

Click on all of the job card tabs to view information about this job.
## Approving a job

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Email notification sent</strong>&lt;br&gt; You will receive an email notification if a job requires your approval. The email contains a link to the job. Click on the link to access the job.</td>
<td><img src="image1.png" alt="Email notification" /></td>
</tr>
</tbody>
</table>

**STEP 2: Review the job**<br> To view the job, you can use the link in the email or login to ANU Recruit (If using the link in the email, go directly to Step 3).<br> From the ANU Recruit home page, click the Approvals button or the Jobs awaiting your approval link. You will be taken to the Manage approvals screen. Select the job you want to approve and click view.<br> Review the information contained on each page by clicking the tabs or using the Next Page link at the bottom of each page.<br> Most of the information about the job is on the Position info page.<br> To review the information that has been entered regarding the advertising of the job, view the Sourcing page. |

**STEP 3: Approve or decline the job**<br> **NOTE:** Do not make changes to the job details during the approval process. If changes are required, discuss with the job originator, or click Decline and add a note.<br> Review the details of the job and then take one of the following actions:<br> **Approve** – an email will be sent to the next approver. If you are the final approver, an email will be sent to the owner of the job advising that the job has been approved. | ![Approve](image2.png) |
Decline – a screen will be displayed asking you to enter a reason as to why the job has been declined. This will be used for reporting purposes and will be emailed to the Hiring Manager and recruiter. In this case, the nominated Recruitment Selection Support person, needs to restart the workflow by doing the following:

1. Open the offer and click “Restart”.
2. Re-enter the approval process.
3. Re-enter the approvers.
4. Submit the offer for approval again.

Note: The hiring manager will be the first approver and can make the required changes to the offer before approving it.

Once you approve or decline a job it will disappear from the Manage approvals page.

STEP 4: Viewing all jobs awaiting your approval
Click My job approvals in the right hand navigation menu.
All jobs awaiting your approval will be listed.
Next to the job that you need to review, click View.
Review the job and then Approve or Decline the job.
Changing Approvers

On some occasions, nominated approvers may not be available to grant their approval in the workflow (for example, an unscheduled leave of absence). In such instances, the workflow will stall until the approver grants their approval. If urgent approval is required, Recruitment Selection Support staff can change the listed approver to another suitable approver.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Review Approval Process</strong></td>
<td>![Image of Approval Process]</td>
</tr>
<tr>
<td>Scroll to the Validation and Approval Process section, at the bottom of the screen.</td>
<td></td>
</tr>
<tr>
<td>Review the list of approvers to confirm the state of the workflow.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Edit Approvers</strong></td>
<td>![Image of Edit Approvers]</td>
</tr>
<tr>
<td>Click the Edit button</td>
<td></td>
</tr>
<tr>
<td><strong>Result:</strong> A list of approvers is displayed. Only approvals that have not yet been granted will be editable.</td>
<td></td>
</tr>
</tbody>
</table>
### STEP 3: Select New Approver

You can change the name of any approver that has not yet granted their approval. To do this:

1. Click the Clear icon.
2. In the name field, do one of the following:
   - type the name of the new approver or press the Tab key.
   - lookup the name using the binocular icon.

Repeat the above steps to change more than one approver.

### STEP 4: Submit changes

Once all changes have been made, click the Submit button.

**Result:** An email will be sent to the newly assigned person. An email will also be sent to the previously assigned approver, letting them know the approval has been reassigned.
Sourcing a job

The Recruitment & Appointments team is the last approver for all advertised workflow approvals. They will source the job as per instructions on the job card. A notification will be sent to both the Hiring Manager and Recruitment Selection Support once this is actioned.

NOTE: Only the Recruitment & Appointments team has access to the Sourcing tab.

### What you need to do

### What you will see

<table>
<thead>
<tr>
<th>STEP 1: Access the Sourcing tab</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>On the Job card, select the Sourcing tab. Click the Add sourcing channels button.</td>
<td></td>
</tr>
</tbody>
</table>

**TIP:** Click the Show advanced options link to next to the Add sourcing channels button to set a default Opening date, Closing date and Application form if you are sourcing to multiple channels. For each sourcing channel you select it will pre-populate with the default information.

**NOTE:** The sourcing tab will display ‘Suggested applicants’ for your job based on a keyword search using the Job title, Summary and Description text on your Job card. If there are no matches or insufficient information then no suggested applicants will display.

<table>
<thead>
<tr>
<th>STEP 2: Enter the opening and closing dates</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the relevant sourcing channel by clicking on the name of the channel – it will highlight in blue. You do not need to check the box, this will happen automatically.</td>
<td></td>
</tr>
</tbody>
</table>

**IMPORTANT:** Always ensure you have a channel for the ANU Internal Website or else internal applicants will need to view the external job website to see jobs they can apply for.

Enter an Opening date. Your job will appear on the sourcing channel on the specified date at the specified time.

For some channels, the Closing date field will also be mandatory. This indicates the date and time that the job will come off the site.
STEP 3: Review text and enter details

Review your summary and the main body of the ad text. The default text for the ad is the text that was entered on the Position info tab.

If you need to modify the text for an individual sourcing channel only, make the modifications on the sourcing window.

Complete all other mandatory fields. These fields will differ slightly from one sourcing channel to another. For example, the fields that you will need to populate for the Seek sourcing channel will differ to those for the company website.

STEP 4: Save and review

Click Save.

Review the information on the Sourcing tab. Ensure that the details are displayed in black text. If you see red text, you have most likely missed a mandatory field.

Click on the name of the sourcing channel or click Edit from the Actions list to review and correct the information.

If you are happy that all information is correct, click Save at the bottom of the page.

At this point your job will be sent to the selected sourcing channels.
## Recording Hold days against a job

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Edit the job</strong></td>
<td><img src="image1.png" alt="Edit icon" /></td>
</tr>
<tr>
<td>Within <strong>Manage Jobs</strong>, click the Edit icon next to the relevant job.</td>
<td>Records 1 to 1 of 1</td>
</tr>
<tr>
<td><strong>STEP 2: Change the job status</strong></td>
<td><img src="image2.png" alt="Status field" /></td>
</tr>
<tr>
<td>Locate the Status field and update the job from its current status into the status of <strong>On hold</strong>.</td>
<td></td>
</tr>
<tr>
<td>Click <strong>Save &amp; Exit</strong> to return to the Manage Jobs page.</td>
<td><a href="image3.png">Status field options</a></td>
</tr>
<tr>
<td><strong>STEP 3: Remove On hold job status</strong></td>
<td><img src="image4.png" alt="Edit Hold Days window" /></td>
</tr>
<tr>
<td>Locate the Status field and update the job from its On hold status into the current status the job should be on (e.g. if the job was on sourcing before the hold period, change the status to Sourcing).</td>
<td></td>
</tr>
<tr>
<td>Click <strong>Save</strong>.</td>
<td></td>
</tr>
<tr>
<td>The <strong>Edit Hold Days</strong> window will appear.</td>
<td></td>
</tr>
<tr>
<td>Complete the Hold start date &amp; Hold end date fields.</td>
<td></td>
</tr>
<tr>
<td>Enter any notes in relation to the hold days that you are recording.</td>
<td></td>
</tr>
<tr>
<td>Click <strong>Save</strong>.</td>
<td></td>
</tr>
<tr>
<td>A history of all previous hold days will display if applicable.</td>
<td></td>
</tr>
</tbody>
</table>
Adding job costs

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Find your job</strong>&lt;br&gt;Click <strong>Manage jobs</strong>.&lt;br&gt;To view the criteria by which you may search for jobs, click <strong>Show other search criteria</strong>.&lt;br&gt;You may choose to search for jobs by job title, job number, recruiter, or any of the other criteria.&lt;br&gt;Click the Search button on the right-hand side of the page.&lt;br&gt;Identify the job for which you need to record job costs.</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
</tbody>
</table>

| **STEP 2: Record job costs**<br>After finding your job, click the Job costs icon on the right-hand side of the page.<br>You will see the Manage job costs page for your job. If no costs have been entered for this job, no costs will be listed on the Manage job costs page.<br>To add a new job cost, click **New Job cost** in the left-hand corner of the page.<br>Select the Job cost category (e.g. Agency fees), enter the Title (e.g. name of the agency) and amount.<br>Select the correct currency if relevant.<br>The Job cost centre will default to the cost centre entered for this job when the job was created. Update the Job cost centre if necessary. | ![Image](image2.png) |

| **STEP 4: Click Save**.<br>Your job cost will automatically be added to the Manage job costs page for your job.<br>Close the Manage job costs pop-up window to return to the Manage jobs page. | ![Image](image3.png) |
Creating a new campaign

Adding a new campaign is for the Recruitment & Appointments team only. In the first instance, campaigns will be used to recruit for the Casual Employment office or to manage the ATSI register. No positions are tied to a campaign.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Click Manage jobs</strong></td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Click New campaign from the options at the top left of the screen.</td>
<td>A campaign is a mechanism for gathering applicants into your database without the need for them to apply for a specific job. Applicants can be pre-screened and invited to apply for suitable jobs as they become available. NOTE: From a reporting perspective, campaigns will not appear in any job reports, ensuring that data, such as 'Time to fill', remains accurate.</td>
</tr>
<tr>
<td><strong>STEP 2: Complete the New campaign page</strong></td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td>You will be presented with the New campaign page. This is generally a simplified version of the Job card. Complete all mandatory fields.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Source the campaign</strong></td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>If you wish to advertise your campaign, access the Sourcing tab and select sourcing channels as you would for a regular job. TIP: When sourcing a campaign to the website or intranet, you will have some campaign specific display options. You can choose to display your campaign above all search results, regardless of what the applicant is searching for.</td>
<td></td>
</tr>
</tbody>
</table>
Alternatively you might choose to only display the campaign above search results if the campaign matches the applicant's search criteria.

The final option is to display the campaign within the standard job list, only if it matches the search criteria.

**STEP 4: Save and view**

When you have entered all of the required information, Save your campaign.

Your campaign will be viewable on your Dashboard, as well as on the Manage jobs page.

TIP: If you cannot view your campaign on the Manage jobs page, your default settings might be set to only display jobs. To change this, set the Types option at the top of the Manage jobs page to All.

Click Search to refresh.
Mail Matcher

The Mail Matcher feature allows you to update jobs and applicants by sending a correctly formatted email to a pre-defined Mail Matcher email address. Each user of ANU Recruit has their own Mail Matcher email address.

Creating a new applicant via mail matcher

The following procedure describes how to create a new applicant record, using the Mail Matcher feature.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Get your Mail Matcher email address</strong>&lt;br&gt;From the Main Menu, click on the <em>Update profile</em> link located in the top right corner of the screen.&lt;br&gt;Your Mail Matcher email address will be displayed.&lt;br&gt;Highlight and copy this email address.&lt;br&gt;TIP: Add this email address to your email contact list, as you will be using it on a regular basis.</td>
<td><img src="image1.png" alt="Mail Matcher email address" /></td>
</tr>
<tr>
<td><strong>STEP 2: Applying an applicant to an existing job</strong>&lt;br&gt;Attach an applicant’s resume and other supporting documentation to an email.&lt;br&gt;Forward the email to your mail matcher email address.&lt;br&gt;Add the [apply] tag anywhere in the subject line or body of the email. Ensure you include the job number – e.g. [apply 123456].</td>
<td><img src="image2.png" alt="Applying an applicant" /></td>
</tr>
</tbody>
</table>

**TROUBLESHOOTING**

- If no matching job record can be found, based upon the job number supplied with the Apply tag, you will receive an error message.
- If the existing applicant has already applied to the same job, you will receive an error message.
- Mail matcher cannot identify any of the attached documents as a resume, you will receive an error message.
# Manage Jobs

## View and edit jobs

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Click Manage jobs</strong></td>
<td>![Manage jobs screenshot]</td>
</tr>
<tr>
<td>Click Manage jobs on the right hand navigation menu. You can choose to view all jobs, or filter the page to only display certain jobs (note that you will only see jobs that relate to the team/s that you have access to). You can filter jobs by status by selecting a status from the Status drop-down list on the left-hand side of the page. For example, you may want to view all jobs in an ‘Offer’ status.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Show other search criteria</strong></td>
<td>![Show other search criteria screenshot]</td>
</tr>
<tr>
<td>Click Show other search criteria to view other criteria by which you can filter your search on. You may choose to search for jobs by job number, recruiter, or any other available criteria. Click the Search button. Identify the job that you would like to view, and click the Edit icon. Click on all of the job card tabs to view information about this job. TIP: You can click on the job title to view and/or edit the job.</td>
<td></td>
</tr>
</tbody>
</table>
Closing a job

In order to complete the recruitment process, it is important to close your job. Closing your job using the following steps will ensure that:

- The ‘Time to Fill’ clock is stopped and a total time to fill figure is calculated.
- Any open sourcing channels are closed (e.g. If your job is being advertised on the website or intranet, the ad will come down).
- Your job will move from a Current job status into a Non-current job status.
- Your job will no longer appear on your Dashboard, nor will it appear in the Current recruitment report.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Go to the Manage jobs page**  
Navigate to the Manage jobs page by clicking **Manage jobs** on the main menu. | ![Manage jobs page](image) |
| **STEP 2: Locate job**  
Search for your job using any of the available criteria.  
By selecting from the Status drop-down you can search all jobs by status.  
Click on the Show other search criteria to search by criteria such as job title, business unit, team, recruiter or hiring manager.  
Click Search. | ![Search for job](image) |
| **STEP 2: Click the Close icon**  
Find the job you that you are ready to close.  
On the right of the screen, click the **Close** icon. | ![Close job](image) |
| **STEP 3: Select job status**  
From the drop-down menu, select the relevant job status, for example ‘Filled’ or ‘Cancelled’ (this list may vary slightly).  
If you are using the agency module, you may have the option to notify any agencies that the job has been closed.  
Click Save. | ![Select status](image) |
**STEP 4: Viewing a closed job**

To view a job that you have closed, navigate to the Manage jobs page.

Select Non-Current Recruitment as the Status in the top left corner.

TIP: To narrow down your search, you may like to add other search criteria by clicking Show other search criteria and adding.
Adding applications to ANU Recruit

New applicant

This functionality can be used if an applicant submits an application manually (for example, via email) or if you are managing an appointment without advertisement, conversion or extension. Once an applicant is added, you don’t have to add them again, you will only have to apply the applicant to the job (see: New job application).

Manually Add an Applicant to the Job

Search for the Applicant

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td></td>
</tr>
<tr>
<td>From the right-hand menu, select <strong>Applicant Search</strong>.</td>
<td></td>
</tr>
<tr>
<td>Step 2</td>
<td></td>
</tr>
<tr>
<td>Search for the applicant:</td>
<td></td>
</tr>
<tr>
<td>• If the applicant doesn’t exist, you will need to add them manually – go to Step 3 below.</td>
<td></td>
</tr>
<tr>
<td>• If the applicant exists, you can link them to the job by creating a new application on their behalf – go to the section: <strong>Link an Existing Applicant to the Job</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Step 3**

Click **New Applicant** in the right-hand menu.

**Result:** The **New Applicant** screen is displayed
### Step 4

Complete the *New Applicant* card, ensure you do the following:

- Complete the following fields:
  - Title
  - First Name
  - Last Name
  - Preferred Name (if applicable)
  - E-mail address
  - Home address
  - City/Suburb/Town
  - Postcode
  - Country
  - State
  - Phone details
  - Employment Status
  - Resume (if applicable)
  - Other document (if applicable)
  - Job
  - Source
  - Do you want to disclose this application to the candidate? – select: **Yes**
  - Make this applicant visible to – select: **All users** (default)

- Do **NOT** complete the following fields:
  - SMS text notification
  - Form
  - Talent pool
  - Tags

**Important:** To enable the applicant to accept an offer online, you must elect to disclose the application to them. In the *Do you want to disclose this application to the candidate?* drop-down, select: **Yes**.

### Step 5

Under *Save Actions*, select **Save and Close** or **Save and Add Another**.

### Step 6

Click **Submit**.
## Invite to apply

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Open applicant card</strong>&lt;br&gt;Open the card of the applicant you have chosen to invite to apply for a job.</td>
<td><img src="image" alt="Screenshot of applicant card" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 2: Invite to apply</strong>&lt;br&gt;Select the Invite to apply option from the drop-down list located in the actions box on the right hand side of the applicant card.</td>
<td><img src="image" alt="Screenshot of actions box" /></td>
</tr>
</tbody>
</table>
**STEP 3: Complete Invite to apply form**

The Invite to apply page will appear in a pop up box.

Job: Select the relevant job number or title.

Application source: Select the desired source you would like the applicant to be assigned.

Closing date: Including a closing date will ensure that the applicant applies in a timely manner. Leave this blank for campaigns that have no close date.

Application form: Select the relevant application form or leave blank if you do not wish the applicant to complete an application form.

External job title: This is the job title that the applicant will see. Not the internal job title.

Job description: Enter the job description here.

Click Next.

NOTE: many of these fields will prefill based on information already on the job card for this role. Details can be altered again at this stage.

**STEP 4: Preview email and send**

Email preview template will appear allowing you to edit details if required.

Click Proceed.
New job application

Use this functionality when you are processing extensions or conversions and the ANU employee has already been added as an applicant in ANU Recruit previously.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Open applicant card</strong>&lt;br&gt;Open the card of the applicant you have chosen to apply to a job.</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td><strong>STEP 2: New application</strong>&lt;br&gt;Select the New application option from the drop-down list located in the actions box on the right hand side of the applicant card.</td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td><strong>STEP 3:</strong>&lt;br&gt;• Select the job that the applicant should be associated with&lt;br&gt;• Select the Application source and Job sourcing channels that apply&lt;br&gt;• If you “disclose this application to the candidate” the applicant will see this application on their web portal.&lt;br&gt;• Select Application status that applies to the specific situation.&lt;br&gt;• Click Apply</td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
</tbody>
</table>
Screening

Reviewing applicants

There are two options for reviewing job applicants:

- The recruiter or Hiring Manager can download and email a PDF document containing all applications (including resumes) to Selection Committee Members (refer to the Section: Bulk Compile and Send for more information) and they can do their shortlisting outside the system.

- Selection Committee Members can login to ANU Recruit and review applications and rate applicants within ANU Recruit. The following procedure describes how to do this.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Log in to ANU Recruit</strong></td>
<td>Navigate to <a href="http://hr.anu.edu.au/employment-at-anu/recruitment-toolkit">http://hr.anu.edu.au/employment-at-anu/recruitment-toolkit</a></td>
</tr>
<tr>
<td><strong>NOTE:</strong> Ensure that you have disabled the Pop-up Blocker on your web browser. For more information go to <a href="http://itservices.anu.edu.au/online-services/enterprise-systems/frequently-asked-questions/">http://itservices.anu.edu.au/online-services/enterprise-systems/frequently-asked-questions/</a></td>
<td></td>
</tr>
</tbody>
</table>
STEP 2: View jobs and applicants

- Click the dark green bubble Selection Committee Review or the link jobs requiring Selection Committee Review.
- The My panel jobs page will display. You will be able to review applicants for all jobs where you are part of the Selection Committee.
- You will see a list of open jobs. To view applicants for a job, click the View applicants link next to the relevant job.

NOTE: You may be a Selection Committee Member, or a Selection Committee Chair.

STEP 3: View Applications

Click View application to open the applicant card.
To review the resume and application form answers, navigate to the Applications section and select the Form or Resume link underneath the Actions menu.

STEP 3: Shortlist applicants online

Click Shortlist. In the pop up window, rank the applicant as either Unranked, Shortlist or Do not shortlist. Please add a Reason for decision. Click Submit.

NOTE: You are able to shortlist applicants online regardless of whether you choose to review applications via PDF or online.

Once you have ranked the applicant and left comments, the rank and comments can be viewed on the View applicants page.

NOTE: Other Selection Committee Members will also be able to view your comments.
STEP 4: View Selection Committee Member Responses

To see the scores and comments of all Committee Members for each applicant:

- From the My Panel Jobs page select the View responses link next to the relevant job.
- A pop up window will display with a consolidated list of applicants and Selection Committee Member responses.
- Click Print to print all responses.
How to Access Applicant Documents

There are two ways to access applicant documents: via Manage Applications or from within the Applicant Card. The second method allows you to access the form AND any supporting documents the applicant has provided (but still takes two steps to get both). The first method only gives the form responses and tells you that the applicant attached documents but doesn’t let you see them.

Accessing Documents from Manage Applications

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td></td>
</tr>
<tr>
<td>From the Manage Applications screen, click the View Answers icon</td>
<td><img src="image" alt="View Answers Icon" /></td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td></td>
</tr>
<tr>
<td>Select the relevant document</td>
<td><img src="image" alt="Document Selection" /></td>
</tr>
</tbody>
</table>
Accessing Documents from the Applicant Card

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td></td>
</tr>
<tr>
<td>From within the Applicant Card, in the Item drop-down list, select:</td>
<td><img src="image.jpg" alt="Image" /></td>
</tr>
<tr>
<td>- Documents, to see all documents the applicant has submitted (including CV and supporting doco)</td>
<td></td>
</tr>
<tr>
<td>- Forms, to see all forms the applicant has submitted responses to (including the application form, offer acceptance/onboarding form)</td>
<td></td>
</tr>
</tbody>
</table>

Search by answers to questions

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Go to Manage applications</strong></td>
<td><img src="image.jpg" alt="Image" /></td>
</tr>
<tr>
<td>Navigate to the Manage applications page and view the list of applicants that you need to shortlist.</td>
<td></td>
</tr>
<tr>
<td>The Search by answers to questions tool can help you to create a shortlist of applicants who have applied to a specific job.</td>
<td></td>
</tr>
<tr>
<td>Click Search by answers to questions in the top left hand corner of the page.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select the questions on which you would like to search</strong></td>
<td><img src="image.jpg" alt="Image" /></td>
</tr>
<tr>
<td>Select the questions on which you would like to search your applicants.</td>
<td></td>
</tr>
<tr>
<td>The questions in the drop-down list are the custom questions (questions on the application form that have been designed by your organisation).</td>
<td></td>
</tr>
<tr>
<td>You can search on as many or as few questions as you like. The more questions you select, the narrower your search will be. The fewer questions you select, the wider your search will be.</td>
<td></td>
</tr>
<tr>
<td>Click Next.</td>
<td></td>
</tr>
</tbody>
</table>
### STEP 3: Select the response(s) for which you are searching

Use the checkboxes to select the response(s) for which you are searching.

- If you select Response A and B and select OR search, you will find applicants who have selected Response A OR Response B (you are widening your search).
- If you select Response A and Response B and select AND search, you will find applicants who have selected Response A AND Response B (you are narrowing your search).

### STEP 4: Finish your search and review your results

Click Finish when you have selected the responses on which you would like to search.

Click Back if you would like to change the questions on which you are searching.

After you click Finish, the applicants who meet your criteria are listed.

To view all applicants again, click the 'i' button next to the job title and click View all applications.
Bulk applicant actions

Bulk actions overview

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bulk apply</strong> allows you to apply multiple applicants to a new job.</td>
<td></td>
</tr>
<tr>
<td><strong>Bulk categorise</strong> allows you to place multiple applicants into one or more categories, such as “Management”. These applicants can be searched on at any time to list all applicants with a specific category.</td>
<td></td>
</tr>
<tr>
<td><strong>Bulk communicate</strong> allows you to send an ad hoc communication to multiple applicants. For example, you may need to let multiple applicants know that a job is on hold.</td>
<td></td>
</tr>
<tr>
<td><strong>Bulk compile</strong> and send allows you to create and email a PDF document containing applications. This is a useful feature for Hiring Managers that want to distribute applications to members of the selection committee.</td>
<td></td>
</tr>
<tr>
<td><strong>Bulk document merge</strong> allows you to create a merged document for multiple applicants. Used for creating contracts in bulk. Could be used if you have 1 job with multiple positions and you wish to create all of the contracts in one action.</td>
<td></td>
</tr>
<tr>
<td><strong>Bulk export</strong> will create a spreadsheet of all job application data based on applicant responses to questions or test results.</td>
<td></td>
</tr>
<tr>
<td><strong>Bulk invite to apply</strong> allows you to invite multiple applicants to apply for a different job – such as moving applicants from a Campaign to an actual job</td>
<td></td>
</tr>
<tr>
<td><strong>Bulk move</strong> allows you to move multiple applicants into a different application status.</td>
<td></td>
</tr>
<tr>
<td><strong>Bulk move and send</strong> allows you to move multiple applicants into a different application status and to send applications (as email attachments) to another user.</td>
<td></td>
</tr>
<tr>
<td><strong>Bulk task/reminder</strong> allows you to select multiple applicants and assign the applicants as a task or reminder. Great for setting reminders for Recruitment Selection Support and HR Division users (for example, “move all applicants on Job X to unsuccessful tomorrow”). Also useful for people to allocate tasks to each other when going on leave.</td>
<td></td>
</tr>
</tbody>
</table>
### Bulk apply

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>

#### STEP 1: Select the applicants
After reviewing the applications for a particular job or campaign, use the checkboxes to indicate the applicants to be included in your Bulk apply.

TIP: If you would like to include all of the applicants who have applied for a job, click All pages in the Select drop-down list.

#### STEP 2: Select Bulk apply
From the Select a bulk action menu at the top of the page, select Bulk apply.

#### STEP 3: Select the job
Click the binoculars to select the Job that you would like to apply the applicants to.

Select the relevant Application source – where did these applicants hear about the opportunity?

Select the appropriate Job sourcing channel.

Select the application Status that the applicants should commence in, e.g. New.

Select whether you would like to link past applications to the new job application.

#### STEP 4: Communicate with applicants
You will have the option of sending the relevant status related communication to the applicant (if appropriate).

Indicate whether you would like to communicate, and then click Apply.

Each of the applicants has now been applied to the selected job.
## Bulk compile and send

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Select the applicants**  
After reviewing the applications for a particular job, use the checkboxes to indicate the applicants to be included in your PDF document.  
Your PDF might only include those applicants who have been shortlisted, or you may choose to include all of the applicants who have applied for a job.  
TIP: If you would like to compile all of the applicants who have applied for a job, click All pages in the Select drop-down list. | ![Checkbox Example](image1) |
| **STEP 2: Select Bulk compile and send**  
From the Select a bulk action menu at the top of the page, select Bulk compile and send. | ![Select Bulk Action Menu](image2) |
| **STEP 3: Select documents**  
Select the documents you would like to include in the PDF (e.g. resume; application form).  
Click the Create PDF button at the bottom of the page. | ![Select Documents](image3) |
STEP 3: Download the PDF
You may wish to download the PDF to preview it or to save it locally.
To download the PDF, right click on the Download document link and select Save Target As....
Indicate where you would like to save the PDF.

STEP 4: Send the PDF
If you would like to send the PDF to a colleague, Hiring Manager, or even yourself, select the Yes radio button.
You can send the PDF to a user of PageUp People by searching for their name in the User field.
To email the PDF to more than one person, or to email someone not in the ANU Recruit system (such as an external selection committee member), list their email/s in the Other Email field. In this case, simply type in the email address, separating each email address with a semi-colon.
Include a From address, a Subject line, and make any changes to the body of the email.
Click the OK button to send the PDF.
The Bulk Compile and Send will be recorded in the Applicant history for all included applicants.

NOTE: All incoming and outgoing mail items are restricted to 25MB. To send or receive email items greater than 25MB, you can use the Cloudstor service: http://itservices.anu.edu.au/email/additional-features-and-applications/send-and-receive-large-emails-cloudstor/

Bulk categorise

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>STEP 1: Select applicants</td>
<td>From the Manage applications page, use the check boxes to select the applicants.</td>
</tr>
</tbody>
</table>
**STEP 2: Bulk categorise**
Using the Bulk actions drop-down list at the top of the page, select Bulk categorise.

**STEP 3: Select a category**
Click the Areas of Interest node, to expand the list of categories.

Select one or more categories from the category library by clicking Add.

**STEP 4: View category**
The category or categories you selected in the Bulk categorise will be visible under the Categories section of the applicant card.

**Bulk move**

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Select applicants</strong></td>
<td></td>
</tr>
<tr>
<td>From the Manage applications page, use the check boxes to select the applicants.</td>
<td></td>
</tr>
</tbody>
</table>
STEP 2: Bulk move
Using the Bulk actions drop-down list at the top of the page, select **Bulk move**.

STEP 3: Select status
Select the appropriate Application status.

Click Next.

Optional. You can send an email to the selected applicants and/or ANU staff, to update them on their new status. If you don't wish to send one or more of these emails, ensure you select the No radio button against the appropriate email option.

Complete any relevant fields on the following page and click Move now to confirm the actions.

You may be prompted to update the Job status, select yes depending on what applicant statuses your job has.
# Bulk Export

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Select Applicants</strong></td>
<td>From Manage application screen, select the applicants you wish to export using the selection tick boxes.</td>
</tr>
<tr>
<td><strong>STEP 2: Select Bulk Export</strong></td>
<td>From the bulk actions drop-down list select Bulk Export.</td>
</tr>
<tr>
<td><strong>STEP 3: Select export information</strong></td>
<td>You will be displayed with the selection list of what information you would like to export (including application form information). As a minimum you are required to export the personal details.</td>
</tr>
<tr>
<td><strong>STEP 4: Download your bulk export</strong></td>
<td>Your export will download in the background. Return home to your dashboard. When the download is complete, you can download it via the tasks on your main dashboard. Click the Edit Task button. Click Submit button. When the export file has been generated, a link will appear at the top of the page. Click the link at the top of the page to launch the export in Excel.</td>
</tr>
</tbody>
</table>

**NOTE:** The export will take a minute or two to complete, depending on the number of applicants you are
exporting. It will only be available to download in tasks, once it has completed.

Individual applicant and application actions

Applicant card overview

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Applicant details</strong></td>
<td>From within the Applicant Card, you can use the Actions drop-down list in the far right-hand corner to perform actions related to this applicant. This includes controlling the applicant (viewing the applicant’s account), editing the applicant’s personal details (such as address), and resetting the applicant’s password.</td>
</tr>
</tbody>
</table>

**Applications**
Any current and previous job applications will be listed, with the submitted date, job number and job title.

Use the Job information button ![Information](image) to view a snapshot of the job details.

Click the Actions drop-down menu to perform an action related to a particular application (e.g. adding a note, uploading a document).

The applicant’s current status is displayed. Click the applicant’s status to update it, or select **Change Status** from the Actions drop-down menu.
Applicant flags
Against an existing application, you can use the Actions drop-down, to activate or deactivate flags for the applicant.
Alongside the relevant application, either click Flags or, from Actions, select Edit Application Flags
NOTE: Flags are used to highlight information about the applicant, e.g. ‘Redeployee’.

Applicant history
Applicant history is a record of all activity for the applicant. This includes notes you have added, forms you have completed (if applicable), and any emails sent to the applicant.

You can filter applicant history to view the aspect of the applicant's history that is important to you. For example, you may need to see all emails sent to the applicant (filter on Communication).

If the applicant has applied for multiple jobs, you can view the history for a specific job by selecting it from the Job filter drop-down list.
### Talent pools

The Talent Pool section lists the talent pools to which the applicant belongs. It also allows you to control tags for the applicant (e.g. Finance or Management). These tags assist with talent pool searching.

To change talent pool or tag information, click the drop-down list and select.

<table>
<thead>
<tr>
<th>Talent Pool</th>
<th>Tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casual Pool</td>
<td>Finance, IT</td>
</tr>
<tr>
<td>Retail</td>
<td>Management</td>
</tr>
</tbody>
</table>

### Resume

The Resume section is at the bottom of the applicant card. It shows the most recent resume for the applicant. It can be accessed via a hyperlink.
## Changing application status

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Manage applications</strong>&lt;br&gt;From the right hand navigation menu, click <strong>Manage applications</strong>.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Search job</strong>&lt;br&gt;Click the <strong>Search</strong> tab and enter your job number into the search field and click on the binoculars. Your job name will appear in the yellow bar.&lt;br&gt;Click the Search button in the top right hand corner.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: View application</strong>&lt;br&gt;Click <strong>View application</strong> to view the details of an individual applicant on the Applicant card.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 4: Update status</strong>&lt;br&gt;Click the current status (e.g. New) under the Applications section of the applicant card.&lt;br&gt;Select the correct status for this applicant and click <strong>Next</strong>.</td>
<td></td>
</tr>
</tbody>
</table>
STEP 5: Review and edit
Review and edit (if required) the Confirm status change page.
If an email message to the applicant has been triggered, review the content of the email.

STEP 6: Move now
When you are ready to make the status change, click Move now.

STEP 7: Updating multiple applicants (using Bulk move)
On the Manage applications page, use the different coloured checkboxes to group the applicants according to the decisions you have made about their progress through the recruitment process.
NOTE: The colours for the check boxes can have any meaning you want.

STEP 8: Select Bulk action
From the Select a bulk action drop-down list at the top of the screen, select Bulk move.
STEP 9: Select application status
For the applicants you selected with each checkbox, select the Application status from the drop-down list and click Next.

STEP 10: Move applicant
Review and edit (if required) the Confirm status change page. If an email message to the applicants has been triggered, review the content of the email.
NOTE: You do not need to edit the merge fields (e.g. {FIRSTNAME}) as the field will be automatically populated when the email is sent.
When you are ready to make the status change, click Move now.
You will then be prompted to update the application status for the applicants you selected with the orange checkbox and the applicants you selected with the red checkbox.
**Applicant actions**

These are general actions relating to an applicant. These actions are not specific to a particular job application.

To perform actions against an applicant, click on the links or select from the drop-down list on the Actions box located at the top right hand of the applicant card. Some functions are not available to all permission groups.

### Applicant actions for screening

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add note</td>
<td>Record a note about the applicant. The note will be stored in the Applicant history with the date, time and name of the person who wrote the note.</td>
</tr>
<tr>
<td>Add document</td>
<td>Upload a document relating to the applicant from a file or the document library. The document will be stored in the Applicant history with the date, time and name of the person who uploaded the document.</td>
</tr>
<tr>
<td>New application</td>
<td>Apply an existing applicant to a current job. This action is useful when you have discussed an opportunity with the applicant and agreed that they will be considered for the role</td>
</tr>
<tr>
<td>New task/reminder</td>
<td>Add a new task to the Task panel on your Dashboard or assign a task to another user. A link to the Applicant card will be available from within the task.</td>
</tr>
<tr>
<td>Research</td>
<td>Visit sites such as LinkedIn, Google and Google Maps to research the applicant. This action provides another way for you to obtain information about the applicant.</td>
</tr>
<tr>
<td><strong>Communicate</strong></td>
<td>Send a once off communication to the applicant via email or sms (e.g. email advising the applicant job has been put on hold). Save time by using an existing template or write your own communication.</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Applicant actions for cleansing or amending applicant data</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Edit</strong></td>
<td>Update an applicant’s personal details, such as phone number, email address or name via the Edit applicant pop up window and click Save once you have finished your changes.</td>
</tr>
<tr>
<td><strong>Merge</strong></td>
<td>Merge duplicate applicant accounts into one if you have identified duplicates. See Managing duplicate applicant records for more detail.</td>
</tr>
<tr>
<td><strong>Reset password</strong></td>
<td>If an applicant is unable to access the system select Reset password from the drop-down list on the applicant card. A Reset password pop up window will appear – click Reset password, this will email the applicant with a new system generated password.</td>
</tr>
<tr>
<td><strong>Remove</strong></td>
<td>If an applicant has requested that their details be removed from the system, this action can be used. NOTE: this action will permanently delete the entire applicant account and all related applications, notes, documents, etc. A Remove applicant pop up window will appear warning the user that they are about to permanently remove the applicant from the system. Click Remove applicant when you are happy to remove the applicant.</td>
</tr>
<tr>
<td><strong>Visibility</strong></td>
<td>Determines whether new applicants entered into the system are visible only to you, the members of your team or all users. NOTE: The level of visibility can only be set when adding a new applicant directly to PageUp, any applicant who has applied via the applicant portal cannot be hidden. An Edit visibility pop up window will appear. Select an option from the Make this applicant visible to: drop-down list and click Save. A yellow information bar will appear at the top of the applicant card advising This applicant is visible to only you/only your team. Click Release to all users to allow other users to see the applicant again.</td>
</tr>
<tr>
<td><strong>Control</strong></td>
<td>View the Applicant services area as if you are the applicant. This feature can be useful when supporting an applicant who is having difficulty with their application. See controlling an applicant for more details.</td>
</tr>
</tbody>
</table>
Invite to apply

Invite an existing applicant to apply for a current job. An email will be sent to the applicant with a link to the job that you have suggested.

View profile

View the most recent profile information for an applicant. This is the information that the applicant enters in the applicant portal via the Update Profile tab:

---

**Merging duplicate applicant records**

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Detect a duplicate accounts</strong></td>
<td><img src="Image" alt="" /></td>
</tr>
<tr>
<td>Any detected duplicates will be flagged with an ‘attention’ symbol in the Manage applications page. Click View against the applicant to open their applicant card. Alternatively, if a user is already on in applicant’s card, a duplicate information bar will be visible at the top left of the card. <strong>NOTE:</strong> Applicants are flagged in the system as possible duplicates when two or more applications are submitted with the same first and last names and any other identical information, such as telephone numbers, postcodes or email address.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: View duplicate information</strong></td>
<td><img src="Image" alt="" /></td>
</tr>
<tr>
<td>Click View on the This applicant may be a duplicate information bar to view more information on the duplicate accounts.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Merge applicants</strong></td>
<td><img src="Image" alt="" /></td>
</tr>
<tr>
<td>You will see a window titled Merge applicants – Step 1 of 2. The details of the applicant you have selected are shown on the left hand side of the page. Select the detected duplicate record from the detected duplicates drop-down menu. Review the details of the applicant you have selected and the details of the detected duplicate.</td>
<td></td>
</tr>
</tbody>
</table>
Have the applications have been submitted by the same person (i.e. the address and phone number information matches) using two email addresses?

- If you believe the applications have been submitted by two different people (i.e. the records are not duplicate records), use the ‘Remove duplicate flag’ button.
- If the records are duplicates, has the applicant applied for the same job twice or has applied for two different jobs, determine which record will be merged into which record. PageUp will make a recommendation based on the account that has had activity most recently. You can accept or ignore the PageUp recommendation.

STEP 4: Withdraw a duplicate application

If the applicant has applied for the same job twice with two different email addresses: applicant 1 should be merged into applicant 2. Before merging the records, the user must withdraw the application linked to the applicant 1 email address.

Click Cancel to return to the Applicant card and update the status of the application to Withdrawn. Ensure that you withdraw the application to the job to which the person has applied twice.

Click Next.

NOTE: It is not necessary to send an email to the applicant at this stage. Click Move now to move this application into the Withdrawn status.

NOTE: This step is not necessary if the applicant has applied for two different jobs. If the applicant has applied for two different jobs, see Step 5 for merging duplicate records.

STEP 5: Merge duplicate records

Navigating back to the Merge applicants – Step 1 of 2’ page, use the radio buttons to merge the duplicate record.

Click Next at the bottom of this screen.

Review the email that will be sent to both email addresses used by the applicant. Make any required amendments.

Click Merge.

The applicant history will automatically contain a record of the merge.
NOTE: Once a record is merged, it is not possible to unmerge the records.

STEP 6: Removing the duplicate flag
From the applicant card, click View on the This applicant may be a duplicate information bar.
Click Remove duplicate flag at the bottom of the screen.
Confirm the decision to remove the flag by clicking Ok.
## Controlling an applicant

<table>
<thead>
<tr>
<th>What you need to do</th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Control applicant</strong>&lt;br&gt;Select Control from the actions drop-down list in the top right hand corner of the applicant card.&lt;br&gt;You will be taken to the applicant services home page.&lt;br&gt;Once you are logged into applicant services as the applicant, you can use the system as if you were an applicant applying online to a position or accepting a booking invite.</td>
<td><img src="Actions.png" alt="Actions" /></td>
</tr>
<tr>
<td><strong>STEP 2 – Returning to the Recruitment dashboard</strong>&lt;br&gt;When you wish to return to your own user account, click the <strong>Back to PageUp People</strong> link in the top right hand corner of the screen.&lt;br&gt;You will be returned to the applicant card you were viewing previously.</td>
<td><img src="Recruitment_dashboard.png" alt="Recruitment dashboard" /></td>
</tr>
</tbody>
</table>
Application actions

These are actions that relate a specific job application. To perform actions against an application, select an action from the drop-down list in the Actions box located to the right of the applications table on the Applicant card. Some functions are not available to all permission groups.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add activity</td>
<td>Update the system to reflect recruiter activity when statuses have not been changed correctly throughout the process. This action will give you the opportunity to ensure that reports are accurate and up to date. From the Add activity pop up window, select the step to place the applicant against and set a time, date and note for the activity. Click Save.</td>
</tr>
<tr>
<td>Edit application source</td>
<td>Update the source information that is currently stored against an application. This action is useful if the applicant has selected the wrong source during their initial submission and will ensure that source effectiveness reports are accurate. Update the source by clicking on the hyperlink alongside the Submitted against the application. Update the source and sub source on the Edit application source pop up window and click Save.</td>
</tr>
<tr>
<td>Send application</td>
<td>Send application specific information to another user of the system via email. Select a user/s from the look up field on the Send application pop up window and review the email. Select the application details and documents to send from the check list. Click Send application.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Send application and change status</td>
<td>Update the status of an applicant and communicate with a user of the system in one action. This action is often used when shortlisting applications for Manager review. Select a user/s from the look up field on the Send application and change status pop up window and review the email. Select the application details and documents to send from the check list. Click Next. Select a status to move the applicant into on the Change application status page. Click Next. Review the email content (if applicable) and click Move now.</td>
</tr>
<tr>
<td>Edit application flags</td>
<td>Edit the application flags that are currently displaying against an application. This might mean activating a new flag or de-activating an existing flag by selecting or de-selecting flags on the Edit application flags pop-up window. Click Submit. Flags will appear against the application below the Actions list and activity of the action will appear under the Applicant history section.</td>
</tr>
<tr>
<td>Add document</td>
<td>Browse your network/pc to upload a document that is specific to a job application. The document will be stored in the Applicant history with the date, time and name of the person who uploaded the document, e.g. Interview notes.</td>
</tr>
<tr>
<td>Add document from file</td>
<td>Merge an application specific document using the document library that is stored in ANU Recruit. For example, Offer letter.</td>
</tr>
<tr>
<td>Add note</td>
<td>Record a note that is specific to a job application. The note will be stored in the Applicant history with the date, time and name of the person who wrote the note.</td>
</tr>
<tr>
<td>Change status</td>
<td>Update the application status for a specific job application.</td>
</tr>
<tr>
<td>Communicate</td>
<td>Send an application specific communication to the applicant via email or SMS. Save time by using a template or write your own communication.</td>
</tr>
<tr>
<td>New booking to an existing event</td>
<td>Manually book an applicant into an event that is already created in the system.</td>
</tr>
<tr>
<td>New booking to a new event</td>
<td>Manually create a new event and book the applicant into the event.</td>
</tr>
<tr>
<td>New task/reminder</td>
<td>Add a new task to the Task panel on your Dashboard or assign a task to another user. A link to the Applicant card will be available from within the task.</td>
</tr>
<tr>
<td>New form</td>
<td>Complete a phone screen or reference check form for a specific job application. The form library can be managed by a system Super User.</td>
</tr>
<tr>
<td>Offer details</td>
<td>View the Offer details page (Offer card) for a specific job application. View existing offer details or update offer related information.</td>
</tr>
</tbody>
</table>
## Phone screen, reference check and interview notes

### Adding forms to an applicant

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Accessing the applicant card</strong></td>
<td><img src="image1.png" alt="Application card" /></td>
</tr>
<tr>
<td>Go to the relevant applicant card and locate the Applications section.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: New form</strong></td>
<td><img src="image2.png" alt="Actions drop-down list" /></td>
</tr>
<tr>
<td>Click the <strong>Actions</strong> drop-down list next to the relevant application.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Click the ‘New form’ link</strong></td>
<td><img src="image3.png" alt="Additional information form" /></td>
</tr>
<tr>
<td>Select the <strong>New Form</strong> link. A listing of all additional information forms that exist in the system will be displayed.</td>
<td></td>
</tr>
<tr>
<td>Click on the name of any form to see a preview in the Form preview panel.</td>
<td></td>
</tr>
<tr>
<td>When you have found the form you wish to add to the applicant card, click <strong>Next</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

---

**Reference check form**

- **Date of reference check**: Sep 12, 2014
- **Reference taken by**: Allan Cunliffe

![Form preview](image4.png)
STEP 4: Complete the form
The selected form will be displayed in an editable format for you to start entering data.
When the form has been completed, either select to Save or Save draft.
A link to the form will then be stored in the applicant history section of the applicant card.
NOTE: Forms saved as drafts are displayed in the applicant history with a status of in progress.

STEP 5: Viewing the completed form
Completed forms are visible from the Applicant history section of the applicant card.
In the Item field, select Forms:
- To view the form in read only format, click the View link next to the form.
- To edit the form’s details, click the Edit link next to the form.
- To remove the form from the applicant card, click the Delete link next to the form.
Adding a document to the applicant card

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Accessing the applicant card</strong>&lt;br&gt;Go to the relevant applicant card and locate the Applications section.</td>
<td><img src="image" alt="Applications section" /></td>
</tr>
<tr>
<td><strong>STEP 2: Select add document</strong>&lt;br&gt;Click the <strong>Actions</strong> drop-down list next to the relevant application and select <strong>Add document</strong>.</td>
<td><img src="image" alt="Add document" /></td>
</tr>
<tr>
<td><strong>STEP 3: Upload a new document</strong>&lt;br&gt;The Upload a new document pop up window will appear.&lt;br&gt;Click <strong>Upload file</strong> to choose a file from your desktop/shared drive.&lt;br&gt;Select the relevant document category – the document category tells the system what type of document you are uploading. For example, if the document is a resume or cover letter.&lt;br&gt;Give the document a title. Leaving this field empty will assign the title already present on the document you are uploading.&lt;br&gt;Click <strong>Save and close</strong>. The uploaded document will appear under the Applicant history section of the applicant card.&lt;br&gt;NOTE: Save and add another, will allow you to save another document straight away.&lt;br&gt;Close will close the pop up window without saving any documents.</td>
<td><img src="image" alt="Upload a new document" /></td>
</tr>
</tbody>
</table>
## Booking and events

Use the Manage Events link on the main menu to view events, view bookings to events, search for events, edit events, delete events and delete bookings.

### New event

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Creating an event**  
Click New event from the main menu.  
An event (e.g. an interview) must be created prior to inviting applicants to the event. | **Events**  
New event  
Manage events  
My events |
| **STEP 2: Enter the event details**  
**IMPORTANT:** Enter a **unique title** so that you can distinguish it from other events. This will also make it easy to search for your event in the system.  
For example, ‘Accountant (Job 12345), interviews, July 2009’.  
Enter all other details, including event type, venue and job.  
**IMPORTANT:** To be able to see and edit the event in the future, ensure the **Owner** is the Recruitment Selection Support person (or team) assigned to the job.  
If relevant, enter a contact name and Public instructions. These will show on the Applicant services centre when the applicant logs in. | **Event details**  
[Image of event details interface] |
| **STEP 3: Enter date and time slots**  
Click the **Add** button to add the event timeslots.  
Enter the date range and select the days of the week on which the event will be held.  
Enter the start and end time. Make sure to enter times as hours and minutes, separated by a colon or full stop (e.g. 9.00 or 9:00)  
Enter the number of positions available at each timeslot in the **Positions** field. **In most cases, this will be 1** (if your event is a one-on-one interview, only one applicant can attend at each timeslot).  
**NOTE:** If you event is a group assessment centre, you might enter “10” into the positions field.  
Click **Invite** and specify the panel members (and optionally yourself). This will allow invitees to see which timeslot an applicant has selected (for more information, see: Reviewing Event Bookings).  
Click **Add** to add the timeslots. | **Bulk add timeslots**  
[Image of bulk add timeslots interface] |
STEP 4: Review the timeslots
Review the timeslots and select the appropriate reminder.
Select Yes to email any selected users.
Click Save.

STEP 5: Events calendar
The events calendar will be displayed.
From here you can search for events and view timeslots.

Invite applicants to an event

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Manage applications</strong></td>
<td>Applicants</td>
</tr>
</tbody>
</table>
| From the right hand navigation menu, click Manage applications. | New applicant  
Talent search  
Manage applicant pool  
Manage applications  
My applicants |
| **STEP 2: Search job**       | Search results                           |
| Click the Search tab and enter your job number into the search field and click on the binoculars. | Search results  
No job selected |
| Your job name will appear in the yellow bar. |                                            |
| Click the Search button in the top right hand corner. |                                            |
| **STEP 3: View application** | View application                        |
| Click View application to view the details of an individual applicant on the Applicant card. |                                            |
**STEP 4: Select application action**

From the Application Actions drop-down list, select the status that indicates the applicant has been invited to an event (e.g. ‘New booking to an existing event’).

**NOTE:** The status you will use will not necessarily be *New booking to an existing event*. Check with your Super User if unsure of the status that you should select.

**STEP 5: New booking**

Select the event type from the drop-down list. Ensure that Select an event is selected. Use the binoculars to search for the event title that you created earlier *(refer to ‘Creating an event’ for more information)*.

Ensure that Allow applicant to choose the time slot is selected.

Applicant change statuses can be selected to automatically move the applicant to the new status when they either accept, or decline the invitation:

- **Accepted:** Interview – Accepted
- **Declined:** Interview – Declined

**NOTE:** Ensure that No is selected against the question: *Accept the booking on behalf of the applicant?*

**STEP 6: Save**

Click Save. Assuming that an email is linked to the status, all of the selected applicants will now receive an email inviting them to book into the event.

The applicant Status will automatically update to the new status.
STEP 7: Invite multiple applicants
On the Manage applications page, select the applicants you want to invite to an event using the check boxes.

STEP 8: Select Bulk action
From the Select a bulk action drop-down list at the top of the screen, select Bulk move.

STEP 9: Select application status
For the applicants you selected with each checkbox, select the Application status from the drop-down list that is linked to an event.
Click Next.

STEP 10: Create event booking invitation
Select Yes to create an event booking for the applicant.
Ensure that Select an event is selected. Use the binoculars to search for the event title that you created earlier (refer to ‘Creating an event’ for more information).
Ensure that Allow applicant to choose the time slot is selected.
Applicant change statuses can be selected to automatically move the applicant to the new status when they either accept, or decline the invitation.
Ensure that No is selected against the question Accept the booking on behalf of the applicant?
**Adding events to a calendar**

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Manage events</strong></td>
<td><img src="image" alt="Manage events menu" /></td>
</tr>
</tbody>
</table>
| Click Manage events from the right hand navigation menu. | **Events**  
New event  
Manage events  
My events |
| **STEP 2: Events calendar** | ![Events calendar](image) |
| The events calendar will be displayed. From here you can search for events and view timeslots by clicking the Timeslots tab. | |
| **STEP 3: Click the calendar icon to add event into calendar** | ![Add event to calendar](image) |
| Clicking the calendar icon allows you to export event details into your email calendar. **NOTE:** You will find this icon next to every event that appears on the Timeslots tabs of the Manage events page | |
STEP 4: Open details of calendar
Once you have clicked the calendar icon the Do you want to open or save this file pop up will display. Clicking Open will show open the details of the event in the email calendar format. 
Click Save & Close to save the file into your email calendar.

Reviewing Event Bookings – Recruitment Selection Support

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Open My Events**
  Click My Events
  **Result:** All event timeslots that you have been invited to will be displayed. |

**STEP 2: Review Event Timeslots**
All event timeslots that you have been invited to will be listed in chronological order.

**Note:** If you expect to see one or more timeslots and they aren’t being displayed, you may need to invite yourself to that timeslot. To do this:

1. Navigate to Manage Events
2. Select the Events tab.
3. Edit the relevant event:
   - Under the Time Slots section, against the timeslots you want to be invited to, click **Edit**.
   - Click **Invite Users** and enter your details.
**STEP 3: Add to Calendar**
If you have not done so already, you can add the click **Add to My Calendar** (for more information, see **Adding Events to a Calendar**).

---

### Reviewing Event Bookings – Panel Member

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: View Interviews</strong></td>
<td><img src="image.png" alt="Image" /></td>
</tr>
<tr>
<td>To see a list of all event timeslots you have been invited to, click <strong>Interviews</strong></td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Review Time Slots</strong></td>
<td><img src="image.png" alt="Image" /></td>
</tr>
<tr>
<td>All event timeslots that you have been invited to will be listed in chronological order. To add a timeslot to your outlook calendar, click the <strong>Add to Calendar</strong> link.</td>
<td></td>
</tr>
<tr>
<td><strong>Note:</strong> A timeslot entry will display: <em>No applicants were found</em> until an applicant has registered for that timeslot. If you expect to see one or more timeslots and they aren’t being displayed, contact your local HR representative and ask them to invite you to the relevant event timeslots.</td>
<td></td>
</tr>
</tbody>
</table>
The offer card and online offer

Once a selection decision has been made and an outcome of “Recommendation to appoint” has been saved against an applicant (by the Hiring Manager), the recruiter will create an offer in ANU Recruit and initiate an online approval process. For advertised recruitment processes the selection committee report will contain details for the offer and the report will be uploaded on the offer card. For non-advertised positions, applicants can process straight from New to Offer.

**Note:** On some occasions, approvers may not be available to grant their approval for their step in the workflow process (for example, an unscheduled leave of absence). In such instances, the workflow will stall until the approver grants their approval. If urgent approval is required, Recruitment Selection Support staff can change the listed approver to another suitable approver (see:
Changing Approvers for more information).

### Making an offer with Offer approval

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Change status to ‘Offer made’</strong></td>
<td>![Image of Change application status screen]</td>
</tr>
<tr>
<td>Navigate to the details of an individual applicant. Change the applicant’s current status by clicking on the blue status link and choose <strong>Offer Preparation and Approval</strong>. Click <strong>Next</strong>. Review the <strong>Confirm status change</strong> page. If prompted, update the status of the job to <strong>Offer</strong>. Click <strong>Move now</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

Please note that if you are creating an offer that another candidate has already declined you may get the following error message:

![Image of Offer details screen: There are no positions available for this offer.]

To resolve this issue, please ensure the declined offer is updated to
STEP 2: Enter offer details
You will be presented with the Offer details page, also known as the Offer card.
Complete all mandatory / relevant fields (e.g. Start date, Base salary, Superannuation, etc).

If the applicant is not already an ANU employee, select an onboarding form.

STEP 3: Generate an Offer Letter
In the Offer documents section and click Merge document and click OK to save.
Select the appropriate offer document and click Merge.
NOTE: In cases where the system cannot locate all of the relevant merge field information, it will provide you with a list of the missing fields. Click Ignore to continue.

Against the merged offer document, click the View link. The document will launch in Word. Save it locally. Make any changes required to the offer contract and save it in Word format.
NOTE: Do not save the contract as an RTF document as it may be too large to add to the Offer Card.

Return to the Offer Card and Delete the originally generated offer contract. NOTE: You MUST delete the original version if you are going to put the offer letter online otherwise the applicant will see both versions of the offer letter
Click Add Document and select the copy of the offer contract you have stored locally.
Enter a title for the contract and click Save and Close.
The contract is added to the Offer Card.
STEP 4: Select approval process
At the bottom of the Offer details page, select an approval process from the drop-down list.
The relevant approval levels will appear in the blank box. Approver names may pre-populate, or you may be required to use the binoculars to search for the relevant approver at each stage of the approval process.

**Note:** If you want to save a draft version of the Offer card without commencing the approval workflow, leave the Validation and Approval Process field value as **None** and click **Save and Close**.

STEP 5: Save and close
Click **Save and close**.
You will be presented with a notification message, similar to the opposite. As per the message, saving your offer will initiate the offer approval process immediately.
Once initiated, the first approver in the process will receive an email prompting them to approve the offer.
Putting the offer online and the applicant experience

Once the offer card has been the approved, Recruitment Selection Support will create an online offer in ANU Recruit.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Change status to ‘Online offer made’</strong></td>
<td></td>
</tr>
<tr>
<td>Select the applicant’s status.</td>
<td></td>
</tr>
<tr>
<td>Change the applicant’s status to <strong>Online offer made</strong></td>
<td></td>
</tr>
<tr>
<td>and click <strong>Next</strong>.</td>
<td></td>
</tr>
<tr>
<td>Review the email to be sent and make any required</td>
<td></td>
</tr>
<tr>
<td>changes. Make sure the following documents are attached</td>
<td></td>
</tr>
<tr>
<td>to the email:</td>
<td></td>
</tr>
<tr>
<td>- the relevant UniSuper booklet (if applicable)</td>
<td></td>
</tr>
<tr>
<td>- Position Description</td>
<td></td>
</tr>
<tr>
<td>- PEWER</td>
<td></td>
</tr>
<tr>
<td>To attach the documents, place your cursor at the</td>
<td></td>
</tr>
<tr>
<td>relevant place in the draft email and select **Insert</td>
<td></td>
</tr>
<tr>
<td>Document** from the <strong>Tools</strong> drop-down. Repeat for each</td>
<td></td>
</tr>
<tr>
<td>document you wish to add.</td>
<td></td>
</tr>
<tr>
<td>At the bottom of the Confirm Status page, update the job</td>
<td></td>
</tr>
<tr>
<td>status to <strong>Offer</strong>.</td>
<td></td>
</tr>
<tr>
<td>Click <strong>Move Now</strong>.</td>
<td></td>
</tr>
<tr>
<td>This status change will trigger an email to the</td>
<td></td>
</tr>
<tr>
<td>applicant, which will explain how to accept their offer</td>
<td></td>
</tr>
<tr>
<td>online.</td>
<td></td>
</tr>
</tbody>
</table>
STEP 2: Applicant experience

Note: This applies to the applicant
The applicant will be instructed to login to their Applicant services area. They will be presented with a banner inviting them to approve or decline the offer.

The applicant will be able to view their offer letter, and then click I accept or I decline.

The applicant must open the offer letter in order to accept or decline the offer.

If the applicant accepts the online offer, his/her application status is automatically updated to Offer accepted.

If the applicant declines the online offer, his/her application status is automatically updated to Offer declined.

TROUBLESHOOTING

If the applicant is unable to see the offer, it is most likely because their application is Undisclosed. To disclose the application:

1. Open the applicant card.
2. Alongside the application you want to disclose, select Disclose Application from the Actions menu

Result: The applicant will now be able to see the View Offer link in their applicant portal.

If the applicant can see the offer page but is unable to accept the offer, it is most likely because they have not viewed the offer contract and checked the I have read and agreed to the terms of the offer set out above checkbox. Once they do both these actions, the I Accept button becomes active.
Non-Advertised Appointments, or Variation to Appointment

This procedure describes the steps required for processing non-advertised appointments and variations to appointments (extensions or conversions) in ANU Recruit.

For an overview of the business process, refer to the ANU Cross Functional Recruitment Process Flow for Non-advertised Appointments and Variations to Appointments.

Hiring Manager

The following steps are typically performed by the Hiring Manager for non-advertised appointments or variations to appointment.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Create a new job, specifying a Method of Recruitment as Appointment without advertisement.</td>
</tr>
</tbody>
</table>
| **Step 2** | Complete the relevant sections of the job card:  
- New appointment – complete Sections 3 and 5.  
- Variation to Existing Appointment (extension or conversion) – complete Sections 4 and 5. |
| **Step 3** | In the Documents tab, upload supporting documentation for the appointment. For example, the applicant’s CV, grant approval. |
Step 4
In Section 5, select the relevant Approval Process:

- Employment without Advertisement – All Staff
- Conversion – All Staff
- Extension – All Staff.

**Note:** The Hiring Manager is the only approver required for the above job approval processes. Delegate approval is required for the formal offer stage of the process (see: Create an Offer for the Applicant).

Step 5
In the Recruitment Selection Support field, add the College/Division team or person who will help with offer contract.

Step 6
Click **Submit & exit**

**Result:** If the job request was completed by the Hiring Manager, it will be self-approved and the job will be displayed on the Recruiter's Dashboard. Once approved, the person listed in the Recruitment Selection Support field (step 5 above) will be notified via email.
Recruitment Selection Support

The following sections describe how to add the applicant to the job and then create a new offer for employment for non-advertised appointments or variations to appointment.

Search for the Applicant

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td></td>
</tr>
<tr>
<td>From the right-hand menu, select <strong>Applicant Search</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

| **Step 2**          |                   |
| Search for the applicant: |                   |
| - If the applicant doesn't exist, you will need to add them manually – go to the section: [Manually Add an Applicant to the Job](#) |                   |
| - If the applicant exists, you can link them to the job by creating a new application on their behalf – go to the section: [Link an Existing Applicant to the Job](#) |                   |
## Manually Add an Applicant to the Job

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong>&lt;br&gt;Click <strong>New Applicant</strong> in the right-hand menu.</td>
<td><img src="image" alt="New Applicant screen" /></td>
</tr>
<tr>
<td><strong>Result:</strong> The <strong>New Applicant</strong> screen is displayed</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Complete the <strong>New Applicant</strong> card, ensure you do the following:</strong></td>
<td></td>
</tr>
<tr>
<td>• <strong>Complete the following fields:</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Title</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>First Name</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Last Name</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Preferred Name (if applicable)</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>E-mail address</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Home address</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>City/Suburb/Town</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Postcode</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Country</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>State</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Phone details</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Employment Status</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Resume (if applicable)</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Other document (if applicable)</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Job</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Source</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Do you want to disclose this application to the candidate?</strong> — select: <strong>Yes</strong></td>
<td></td>
</tr>
<tr>
<td>o <strong>Make this applicant visible to</strong> — select: <strong>All users</strong> (default)</td>
<td></td>
</tr>
</tbody>
</table>

• **Do NOT** complete the following fields:<br> o **SMS text notification**<br> o **Form**<br> o **Talent pool**<br> o **Tags**

**Important:** To enable the applicant to accept an offer online, you must elect to disclose the application to them. In the **Do you want to disclose this application to the candidate?** drop-down, select: **Yes**.
Step 3
Under *Save Actions*, select **Save and Close** or **Save and Add Another**.

Step 4
Click **Submit**.

Go to the Section: [Create an Offer for the Applicant](#)

### Link an Existing Applicant to the Job

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td></td>
</tr>
<tr>
<td>From the applicant search results, click <strong>View Application</strong>.</td>
<td></td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td></td>
</tr>
<tr>
<td>From the top right-hand <strong>Actions</strong> menu, select <strong>New Application</strong>.</td>
<td></td>
</tr>
</tbody>
</table>
Step 3

Complete mandatory fields:

- Job
- Application source
- Job Sourcing Channel
- Do you want to disclose this application to the candidate? – select: Yes
- Application Method – select: Just apply them to the job
- Application Status – select: Recommendation to Appoint
- Application Form – select: No application form (default)

Important: To enable the applicant to accept an offer online, you must elect to disclose the application to them. In the Do you want to disclose this application to the candidate? drop-down, select: Yes.

Step 4

Click Apply.

Result: The Confirm Status Change screen is displayed.
Step 5
Scroll to the bottom of the screen and update the status of the job to Offer by clicking the Yes radio button.

Step 6
Click Move Now.

Result: The offer card is displayed. Go to the Section: Create an Offer for the Applicant.
Create an Offer for the Applicant

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong>&lt;br&gt;Create a new Offer Card by completing all mandatory fields, paying special attention to the following:</td>
<td><img src="image.png" alt="Image of offer card creation" /></td>
</tr>
<tr>
<td>- <strong>Hours per Week</strong> – where hours are irregular, enter 0</td>
<td><strong>HOURS OF WORK</strong>&lt;br&gt;Hours per week: 0&lt;br&gt;Work 1: Part time days and hours: &lt;br&gt;Work 2: Part time days and hours:</td>
</tr>
<tr>
<td>- <strong>If Casual</strong> – <strong>Total number of hours for contract</strong>&lt;br&gt;<strong>Base Salary</strong> – For casual professional staff, enter $0 or the annual FTE amount. For casual sessional academics, enter $0. Ignore any warning message displayed.</td>
<td>If Casual - Total number of hours for contract: 140</td>
</tr>
<tr>
<td>- <strong>Hourly Rate for Casual</strong>&lt;br&gt;<strong>Onboarding Form</strong> – If the applicant is a new employee, in the Onboarding section, select: ANU Onboarding Form for New Employees.&lt;br&gt;<strong>Validation and Approval Process</strong> – select the relevant approval process:</td>
<td><img src="image.png" alt="Image of onboarding form" /></td>
</tr>
<tr>
<td></td>
<td>o Employment without advertisement: Depends on the job. Select from the relevant process names prefixed with: “Employment w/o Advert”&lt;br&gt;o Extension: Depends on the job. Select from the relevant process names prefixed with: “Extension”&lt;br&gt;o Conversion: Depends on the job. Select from the relevant process names prefixed with: “Conversion”.</td>
</tr>
</tbody>
</table>

| **Step 2**<br>To initiate the approval workflow, click **Submit**. | **RESULT**: The approval workflow is started and the Hiring Manager and other approvers will be sent the offer for approval, in turn. |
| | Each day, a Daily Offers Approved report is distributed to HR teams. This report lists the offers approved in the previous day. **Note**: If there were no offers approved the previous day, no report is sent. |
### Step 3
Check the *Daily Offers Approved* report to check when the offer approvals are completed.

Once the offer has been approved, open the applicant card.

### Step 4
Against the relevant job, click the status link or, from the *Actions* menu, select **Change Status** (in the example shown, the status is **Recommendation to Appoint**).

### Step 5
In the *Change Application Status* screen, select: **Online Offer Made**.

### Step 6
Click **Next**.
Step 7
In the Confirm Status Change screen, review the email instructions for the applicant and ensure they are correct.

Step 8
At the bottom of the Confirm Status page, update the job status to Offer, by selecting the Yes radio button.

Step 9
Click Move Now.
Result: The applicant is sent an email with instructions on accepting the offer online.
# Reports

## Viewing a report

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Access Reports</strong></td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Click Reports on the right hand navigation menu</td>
<td></td>
</tr>
</tbody>
</table>

| **STEP 2: Click View reports**               | ![Image](image2.png) |
| Next to the report you want to run, click the one of the following icons: |                   |
| View – to view the report within ANU Recruit |                   |
| CSV – to launch the report as a CSV in Excel |                   |
| Excel – to launch the report in Excel       |                   |

## Editing a report

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Access Reports</strong></td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Click Reports on the right hand navigation menu</td>
<td></td>
</tr>
</tbody>
</table>

<p>| <strong>STEP 2: Click Edit reports</strong>               | <img src="image4.png" alt="Image" /> |
| Next to the report you want to run, click the Edit button. |                   |</p>
<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 3: Add or modify users**  
You can add or remove staff in your team to reflect staff movements. To add a new person, click Add. To remove an existing person, click the Remove link, next to the person’s name.  
**Note:** These reports contain sensitive information. Ensure that you only grant access to people in your College or Division.  
Once you have finished, click **Next** | ![Add user](image) |
| **Step 4: Modify an existing report filter**  
Some reports have filters set to limit results. Some of these filters are not editable for security and privacy reasons, such as College/Division. Other filters can be edited or removed as required.  
To modify an existing filter, you can type over the default text displayed. In the example opposite you can change the filter from “Smith” to the desired applicant’s last name or remove the filter to see all applicants for your College/Division. | ![Modify filter](image) |
| **STEP 5: Add report filter**  
Drag a column from the list on the left hand side to the add Report Filters section on the right hand side.  
Filters allow you to limit the information included in your report and allow you to only include relevant information (for example, Applicant Last Name).  
**TIP:** You can filter by more than one value. | ![Add filter](image) |
| **STEP 6: Save and view**  
When editing the layout of a report, you can click the **Save & View** button, to save changes and view the report or **Submit & Exit** to save changes and exit the report. | ![Save & view](image) |
New Starters

The *New Starter Report* enables you to gather all relevant information for specific new starter so you can either: add the person to HRMS, if they are not a current employee; or update the details of an existing employee.

**Running the New Starter Report**

The following procedures describe how to access new starter information (such as bank and contact details) via the *New Starter Report*.

**Note:** This procedure is not intended to change current responsibilities for creating an employment record for new staff in HRMS.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Access the New Starter report</strong>&lt;br&gt;Click <strong>Reports</strong> on the right hand navigation menu.</td>
<td>![Image of Reports menu]</td>
</tr>
<tr>
<td><strong>STEP 2: Edit the report</strong>&lt;br&gt;You need to edit the report to return results for a specific new starter.&lt;br&gt;&lt;br&gt;Click the <strong>Edit</strong> icon&lt;br&gt;Click <strong>Next</strong></td>
<td>![Image of Edit window]</td>
</tr>
<tr>
<td>What you need to do</td>
<td>What you will see</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
</tr>
</tbody>
</table>
| **STEP 3: Change the report filter**  
Change the *Applicant Last Name* filter field to the last name of the new starter. | ![Image of report filter change](image1.png)  
Click **Save & View** |
| **STEP 4: Export the report to Excel**  
From the *Select a Format* drop-down, select *Excel File*  
*Note:* The first column of the report shows whether the person has indicated previous employment with the University. | ![Image of export to Excel](image2.png)  
Click **Export**  
**Result:** The *Download* window will be displayed. |
| **STEP 5: Download the report**  
Click the Download Report link. | ![Image of download report](image3.png)  
Download Report |
<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 6: Save the file</strong></td>
<td>Select the <strong>Save File</strong> option and click <strong>OK</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Result:</strong> The file will be saved in the default downloads folder. To see the file, select press <strong>CTRL + J</strong>.</td>
</tr>
</tbody>
</table>
Creating a Blind Job

**Note**: As this is a job sourcing task, only the Recruitment & Appointments team has access to this feature.

Blind jobs are jobs that are effectively hidden from general applicants. Only applicants that know the job number or the direct URL for the advert will be able to view the job description and apply.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Create a job and source**  
Create a job as per the normal process | |
| **STEP 2: Make the job a ‘Blind’ job**  
In the sourcing tab, add a new sourcing channel:  
- If this is an internal job, check the **ANU Internal Website** sourcing channel checkbox  
- If this is an external job, check the **ANU External Website** sourcing channel checkbox | |
| **NOTE**: do not select Blind Job for UniJobs or SEEK channels.  
Complete all other details as you normally would.  
Check the **Blind Job** checkbox. | |
| Click **Submit**  
Click **Submit & Exit**  
Make a note of the Job Number | |
<p>| <strong>Result</strong>: The job will be posted to the appropriate channel after approximately 30 minutes. | |</p>
<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td>STEP 3: Accessing the link</td>
<td><img src="image" alt="Login" /></td>
</tr>
<tr>
<td>Once the job has been posted to the selected sourcing channel, go to the relevant job website (either internal or external jobs). Search for the job by entering the Job Number in the search field. <strong>Result:</strong> The job ad will be displayed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Job Details" /></td>
</tr>
<tr>
<td>STEP 4: Copy the link</td>
<td><img src="image" alt="URL" /></td>
</tr>
<tr>
<td>In the URL bar of the browser, copy the URL.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="URL" /></td>
</tr>
<tr>
<td>STEP 5: Notify Applicants</td>
<td><img src="image" alt="Email" /></td>
</tr>
<tr>
<td>Using the copied URL, you can now create a hyperlink that will take prospective applicants directly to the job advertisement, from which they can apply.</td>
<td></td>
</tr>
</tbody>
</table>
Job Templates

Note: Recruitment & Appointments and HR Systems are the only users that can manage Job Templates.

Manage job templates

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>

**STEP 1: Navigate to Manage job templates**
Navigate to Manage job templates on the main navigation menu.

**STEP 2: View existing job templates**
A list of all job templates within your system will be displayed.

**STEP 3: Edit an existing job template**
Click Edit beside an existing template. Your will be able to review & edit any existing content within the job template. After making any changes click Save.
STEP 4: Create a new Job Template
On the Manage templates page, click the New job template link in the top left corner.
Complete the mandatory fields based on the job template that you are creating.
After filling in the relevant fields click Save.

FORMATTING TOOLBAR
There is a formatting toolbar in each job template.
The formatting toolbar allows you to format the text within the job template as well as inserting items such as images or documents via the tools drop-down.
Talent Search

NOTE: Only the Recruitment & Appointments team has access to this feature as they have department-wide access.

Talent Search Overview

Talent Search gives you the ability to search applicants – as part of building a talent pool or to create a shortlist of applicants before sourcing externally.

You can use Talent Search to quickly find people in your Talent Pools or search everyone who said they are interested in your company by applying for a job. The search functionality looks at the applicant’s resume, their profile and system features such as your categories and flags.

Talent Search has been designed for both power Boolean users and those who aren’t quite sure what Boolean is. If you’re able to search websites when looking for a house, a job, or a car, you’re ready to use Talent Search – and with a couple tips, you’ll be a master of the search in no time!
Adding and removing talent pools against an applicant card

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Access the applicant card</strong></td>
<td><strong>Applicants</strong></td>
</tr>
</tbody>
</table>
| From the right hand navigation menu, click Manage applicant pool and enter the applicants name in the search bar. Alternatively enter the applicants name in the Quick search bar at the top right hand of your screen and hit enter. The applicant’s card will appear in a new pop up window. | **New applicant**
**Applicant search**
**Talent search**
**Manage applicant pool**
**Manage applications**                                                             |
| **STEP 2: Talent pools**                                                            | **Talent pools**                                                                   |
| Scroll down to the Talent pools section of the applicant card. Click Edit. A list of talent pools you have access to in the system will be displayed in the Edit: Talent pools pop up window. | **Edit**
**Make active**                                                                  |
| **STEP 3: Add talent pools**                                                        | **Edit: Talent pools**                                                             |
| From the Edit: Talent pools pop up window, tick the relevant talent pools you want the applicant to appear in. Click Save. Talent pools that have been added to the applicant will now appear in the Talent pools section of the applicant card. | **Account Manager**
**Casuals**
**Engineering**
**HR Managers**
**Information Technology**
**Machinery**
**Brand Managers**
**Emergency Receptionists**
**Finance**
**Information Technology**
**Machinery**
**Brand Managers**
**Emergency Receptionists**
**Finance**
| **STEP 4: Remove an applicant from a talent pool**                                   | **Edit: Talent pools**                                                             |
| To remove an applicant from a talent pool, click Edit under the Talent pools section of the applicant card. Un-tick the box next to the talent pool you wish to remove the applicant from. | **Casuals**
**Construction**
**Engineering**
**Finance** |
## Conducting a Talent search

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Select Talent search</strong></td>
<td></td>
</tr>
<tr>
<td>From the right hand navigation menu, click Talent search.</td>
<td></td>
</tr>
<tr>
<td>NOTE: You can conduct a Talent search using Keywords, Criteria filter or a combination.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Keyword search</strong></td>
<td></td>
</tr>
<tr>
<td>Click in the Search box.</td>
<td></td>
</tr>
<tr>
<td>Type the keyword you want to search on and click the Search button.</td>
<td></td>
</tr>
<tr>
<td>Your results will automatically display with the applicant’s Summary Postcard.</td>
<td></td>
</tr>
<tr>
<td>TIP: Keyword searches are from reading the Applicant’s Resume and the applicant’s Profile. Keywords such as a job title are often a good place to start when searching.</td>
<td></td>
</tr>
<tr>
<td>NOTE: You can also use the search box for more advanced searching using Boolean strings. Type your Boolean query in the search bar, or if you’re unsure how Boolean works, click on Search builder.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Select Search Builder</strong></td>
<td></td>
</tr>
<tr>
<td>Click on the Search builder link next to the search box.</td>
<td></td>
</tr>
<tr>
<td>Enter the keywords you are looking for in the text fields.</td>
<td></td>
</tr>
<tr>
<td>TIP: This exact phrase is equal to using quotes, so “senior recruiter” would return results where senior recruiter appears on the resume as phrased.</td>
<td></td>
</tr>
<tr>
<td>All of these words is equal to an AND search, so would return results where senior and recruiter appear on the resume.</td>
<td></td>
</tr>
<tr>
<td>None of these words is equal to using NOT, so results would exclude the word say for example HR director.</td>
<td></td>
</tr>
<tr>
<td>Click <strong>Search</strong>. Your results will display in the main Talent search page.</td>
<td></td>
</tr>
</tbody>
</table>
STEP 4: Create Boolean queries

Click Add more.

The Add more button lets you delve deeper into the search by using the AND / OR command with a range of criteria.

The first option is for selecting the AND / OR command.

The second select list allows you to choose from a number of options from the applicant’s resume, profile and system information.

The third select list is for choosing options such as is, is not, contains, does not contain.

The fourth option is for you to type the keyword you want to search on.

Click Add more to add additional search criteria.

Click Search.

Your results will display in the main Talent search page.

TIP: A good combination of keywords and filters used together will give you more meaningful and closely matched results.
STEP 5: Category search – Selecting filters

From the left side of your screen select the filters you want to use to narrow your search results.

Click in the Criteria box to view a list of filters available. The numbers next to each filter option show how many results will be returned when applying the filter.

NOTE: The main Talent search page will automatically update according to your filters. The number of applicants matching your filters will appear in the top left corner of the screen.

NOTE: Filters are determined by the information in your database and come from either your applicant’s Profile information, usually gathered in the application form, or from system information such as Categories, Talent Pools, Flags, Current status, Last communication etc).

TIP: When searching within the same Category, the search is using OR. For example, if you add two filters to your search category, it’s looking for people in filter A OR filter B.

When searching with multiple Categories, the search is using AND. For example, if you have one filter in category A and one filter in category B, it’s looking for people in category A with the selected filter AND in category B with the selected filter.

HELP: For more information watch the video in Online help located in the Help menu on your Dashboard.
STEP 6: Perform Bulk Actions

Use the select boxes in the top right corner of the Summary postcard to put applicants into Buckets.
There are 3 different colours so you can place searched applicants into 3 different 'Buckets', this allows you to perform 3 different actions in one step, just as you would in Manage applications.

When you have selected you applicants, the tabs at the top of the Talent Search Page will highlight how many applicants have been selected in each coloured box.

Click the tab you wish to action.

Once in the tab you will be able to perform Bulk Activities against the applicants that have been selected against that colour and appear in that tab.

You can then repeat this and complete your actions for each tab.

Click Clear all to remove applicants from the Bucket.

STEP 7: Save, share or email your search

Click Save in the top left hand side of the screen.

You'll then be prompted to Name your search.

Click the Save button

Type the name you want to save your search as in the Name text box.

Select the Email me daily when new applicants match my search select box to receive daily emails.

Check the Share this search check box to allow other users to view your saved searches.

TIP: Make sure to give your search a meaningful name as you'll have the option to email a daily summary of any new applicants matching your search criteria.
STEP 8: View Saved searches
Click Saved Searches.

At the top of the page you will see your Saved searches. You can edit the settings of these searches or delete the search.

Underneath your Saved searches you will see Shared searches. To run a search, click View.

To return to Talent Search, click the Back to Search link in the top left hand corner of the screen.

NOTE: The email is sent once per day and contains a maximum of 20 new applicants. If there are no new applicants that match your search, you will not receive the email.

Summary postcard
You can view the applicant's details on the “Summary Postcard”.

Applicant name: To view the full Applicant card, click on the applicant’s name.

Address: This is the applicants address as read from the resume and Applicant profile

Headline Role: Their current or most recent role appears as the headline.

Past roles: Displays up to the applicant’s last three roles including time in the role.

Resume: Displays examples from the resume where your keywords appear.

Icons: Click on the View or Download icon to view the applicant's resume.

Education: Will display a summary of the applicant’s education.

Talent pools: Any Talent pools the applicant is in will display

Contact: Contact details including email and phone numbers will appear

More like: Click this link to see other applicant’s in your database that are similar. Results are displayed based on keyword searches of the applicant's resume and Profile information.
More like this
From the search results, click the More people like [applicant’s name] link.
This will look at keywords on the resumes and in the profile information and find you applicants that are like the original applicant.
NOTE: You can click on the more people like link as many times as you wish. To return to the previous applicant matches, click Back (located in the applicant summary postcard).

Create and send e-Zines

NOTE: Only the Recruitment & Appointments team has access to this feature.

With the use of Talent Search functionality within ANU Recruit, recruiters can design, create and send out e-Zines to candidates within predefined talent pools.

Features and benefits

- Ability to easily communicate to your candidates in a bulk action.
- Ability for your employer brand to be top of mind for candidates.
- Ability to communicate with candidates and have all activity logged against the applicant.
- Ability to tailor the e-Zine to reflect your organisation’s corporate branding.
- Ability for e-Zine content to be relevant to the candidates through the use of talent pools.

What you need to do

STEP 1: Accessing e-Zine
Click Communication Centre on the right-hand navigation menu.

You will be presented with the Communication Centre page.

e-Zines – click to create a new e-Zine.
STEP 2: Creating a new e-Zine
Click **New e-Zine** in the top left corner of the screen.
Begin to create your e-Zine by giving it a title.
Select a design template from the drop-down list – this will determine the 'look & feel' of your e-Zine.
Also enter:
- From name
- From address
- e-Zine subject.

STEP 3: Writing your e-Zine
Complete all of your content drafting and editing in an external text editing program, such as WordPad, notepad.
When you have a finalised document, copy the text from the text editing program and paste the content into the e-Zine content box.
You can spell check and preview the content.
When you have completed your e-Zine, click **Save**.

STEP 4: Sending your e-Zine
From the Manage e-Zines page, click **Send** next to the e-Zine that you would like to send.
From the next screen, you will be able to search for the appropriate recipients from an existing talent pool and a range of other criteria.
Once you have selected your search criteria click **Search**.
STEP 5: Select recipients
A list of search results will be displayed, based on your search criteria.
You can remove recipients by un-ticking the box next to an individual’s name.
When you are happy with the selected recipients, click Next to view a preview of your e-Zine.
TIP: It is strongly recommended that a test e-Zine be sent before completing a send to the public.

STEP 6: Send now
Click Send now to send your e-Zine to the selected recipients.
NOTE: You will be notified of the number of e-Zines being sent along with a notification if any of the selected recipients have opted out of receiving e-Zines.

STEP 7: Confirm e-Zine send
You will be asked Are you sure you want to send this e-zine…
Click Send now.
You will be returned to the Manage e-Zines page.

Viewing history of e-Zines sent to applicants
You can see any history of e-Zines that are sent to applicants from the Applicant card under ‘Applicant history’ section.
Click View to view the e-Zine that was sent.
Opting out of receiving e-Zines

Applicants have the option of opting out of receiving e-Zines.

If an applicant requests to opt out, open the Applicant card. Under the Details section click on the green Tick. The Edit subscription status window will appear, click No. Click Save. The applicant will no longer receive e-Zines.

Designing e-Zine templates

NOTE: Only the Recruitment & Appointments team has access to this feature.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Accessing e-Zines** | | Applicants
New applicant
Applicant search
Talent search
Manage applicant pool
Manage applications
View applicants
Manage offer approvals
| Communication Centre | Communication centre

Click Communication Centre on the right hand navigation menu.

You will be presented with the Communication Centre page.

Click Design templates to create a new e-Zine design.

NOTE: To create a new design template requires knowledge of HTML coding.
STEP 2: Create New design template
Click on the New design template link in the top left hand corner of the screen.
You’ll be presented with the New design template screen.
Give your template a name (e.g. New opportunities, Careers monthly, Christmas casuals, Newsletter etc).
Text styles: Define the font family, font size and colour of all the headings that will be used. The font styles must be defined in CSS format e.g. font-family: Arial; font-size: 13px; colour: #0094D4; font-weight: 400;
CSS Code examples:
- Heading 1
css font colour – colour: #0094D4;
This is a blue Heading 1
css font family – font-family: Arial;
This is a Heading 1 with Arial font
css font size – font-size: 14px;
This is a Heading 1 with font size of 14px
css font style – font-style: italic;
This is a Heading 1 in italic font
css font weight – font-weight: 100;
This is a Heading 1 font with 100 thickness
[Values range from 100 (thin) to 900 (thick)]
TIP: You must end each code with a semi-colon.

STEP 3: Create Template content
Template content: Create the desired design layout into the Template content. Commonly a table would be used to layout the elements of your job template.
The Format selection menu can be used to apply text styles to your template content.
The Tools menu can be used to insert images and tables or access the HTML source of the design template directly.

STEP 4: Click Save
Click Save to store the design template. You will be returned to the main Manage design templates screen.
EXAMPLE
Image: Aqua Corp
Tools: Insert image
Heading 1: New Opportunities
CSS: colour: #C9252C; font-size: 18px; font-family: Arial;
font-weight: 800
Heading 2: Sub heading
CSS: colour: #0094D4; font-size: 14px; font-family: sans;
font-weight: 200
Normal text: Insert text
CSS: font-family: Arial; font-size: 12px
# Report builder

## Report delivery

**NOTE:** Only HR Systems have access to this feature.

PageUp People reports can be automatically scheduled to deliver via email at set intervals however a report delivery for the required report must be set up in PageUp People.

**IMPORTANT!**

If you archive a report, the delivery schedule will automatically delete itself.

Report delivery schedules will send for 12 months from creation, after which you should extend the expiry date. This system will not alert you that the delivery has expired.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Access Reports**  
Click on Reports from the right hand navigation menu or alternatively via the reports tab at the top left corner of the administration screen. | ![Access Reports](image) |
| **STEP 2: Click Manage: Report delivery**  
Click the Manage: Report delivery link in the top right hand corner. | ![Manage: Report delivery](image) |
| **STEP 3: Create new report delivery**  
Click the New link found on the top right hand corner.  
**Name:** Give your delivery schedule a name.  
**Report:** Select the report you wish to schedule from the drop-down list.  
Select the frequency and time to deliver the report and review the text of the email that will be sent.  
**Users:** Click the Add Users button and select any users you wish the report to be delivered to.  
Click Submit. | ![Create new report delivery](image) |
STEP 4: Details of created report delivery
Once you have clicked Save, you will be redirected to the Manage: Report delivery page which will now display the newly created report schedule.
The email will be sent to the specified users, according to the schedule created.
## Report builder

### What is ‘Report builder?’

Report builder allows you to create your own reports. You can do this by selecting what you want to report on (e.g. jobs, applicants, current recruitment) and then selecting the columns that you will need in order to create a report that is meaningful to you. Report builder allows you to see your data represented visually through a range of charting options.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Access Reports</strong></td>
<td>![Log out]</td>
</tr>
</tbody>
</table>
| Click on Reports from the right hand navigation menu or alternatively via the reports tab at the top left corner of the administration screen. | Reports
Survey
System settings
Users |

| **STEP 2: Manage: Reports builder** | ![Manage: Report delivery] |
| Click the **Manage: Report builder** link in the top left hand corner of the page. | Manage: Report delivery History: Reports sent Manage: Report builder |
| A list of all Report builder reports will display. | Manage: Report delivery History: Reports sent Manage: Report builder |
| From here you can edit, view or export the report into CSV or Excel formats. | Manage: Report delivery History: Reports sent Manage: Report builder |

| **STEP 3: Create new report** | ![New Back] |
| From the Manage: Report builder page, click the **New** link. | New Back |
STEP 4: New report
Give your report a title that is meaningful to you and to others.

STEP 5: Select data set
Select What do you want to report on?
For each option, the Details link will provide information about that option in the panel below.
Click Select to select the report you want to create.

STEP 6: Decide permissions
Add users that can access the report.
Separate sections of this page can be used to specify which users can edit or view the report.
NOTE: Selecting an All users can... option will allow anyone who has access to PageUp (including Hiring Managers) to access this report.
**STEP 7: Add columns**

Drag and drop or double click the columns (on the left-hand side of the page) onto the workspace to build your report.

As you drag and drop columns into the report (or double click), the sample data will help you to decide if this is the column you need in your report.

**STEP 8: Add sorting**

Drag a column from the list on the left hand side to add to the sorting section on the right hand side.

TIP: You can sort by more than one value.

**STEP 9: Add report filter**

Drag a column from the list on the left hand side to the add report filter section on the right hand side.

Filters allow you to limit the information included in your report and allow you to only include relevant information.

TIP: You can filter by more than one value.

**STEP 10: Add grouping or charting**

Drag a column from the list on the left hand side to add grouping/charting section on the right hand side.

Grouping provides another method of organising the data in your report.

For example, you may drag the Recruiter field into the Report grouping area. This means you will see the current recruitment information grouped by recruiter.

The data within each group will be sorted by the value you have added to the ‘add sorting’ area.

To create a report with a chart, drag a column into the grouping/charting section on the right hand side.

Select a chart type. Chart types available are Bar, Pie, Line, Column, Area and Radar.

Select the function you need to be performed and displayed on Axis 2. The options are: Count, Sum and Average. The default option is Count. If you choose Sum or Average, you must select the value you wish to Sum.
or Average (e.g. Vacancies). Axis 1 will always default to the Level 1 grouping.

The chart will be displayed after you click Save & Run.

**STEP 11: Save and view**
When editing the layout of a report, you can click the Save & view button. This can be found on the top right hand corner of the page.

**STEP 12: Save and exit**
When you are happy with your report, click Save and exit.
All reports that you create are stored on the Manage: Report builder page under My reports.

**STEP 13: Export report**
Select a format from the drop-down list to export to other file formats such as Microsoft Excel, PDF, and CSV.
# Appendix A – ANU Recruit Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANU Recruit</td>
<td>The University’s recruitment system. Refers to the jobs website as well as the interface for hiring managers and administrators.</td>
</tr>
<tr>
<td>Applicant Card</td>
<td>The record containing all information about an applicant, including: personal information, applications, and a log of actions relating to the application process.</td>
</tr>
<tr>
<td>Central HR</td>
<td>Refers to the Recruitment and Appointments section of the Human Resources Division</td>
</tr>
<tr>
<td>Employee Card</td>
<td>The record containing information about a user of the system, including: permissions and access level and teams they belong to.</td>
</tr>
<tr>
<td>Hiring Manager</td>
<td>This is the person responsible for submitting the job for approval. This person may also be the chair of the selection committee.</td>
</tr>
<tr>
<td>Job Card</td>
<td>The record containing all information relating to the job vacancy being advertised for filling, including: position details, approval workflow, approvers, advertisement text, and selection documentation.</td>
</tr>
<tr>
<td>Nominee</td>
<td>Could be any person assisting the Hiring Manager to complete the job. This person may also be Recruitment Selection Support.</td>
</tr>
<tr>
<td>Offer Card</td>
<td>The record containing information regarding an offer of employment, including: applicant being made the offer, offer contract, remuneration, on-boarding form, approvers, and approval workflow.</td>
</tr>
<tr>
<td>Owner</td>
<td>The person who has ownership of the job, offer or event. For example, the owner of an event has permission to view and edit the event.</td>
</tr>
<tr>
<td>Recruitment Selection Support</td>
<td>Have college/division-level access in ANU Recruit. Most commonly a HR Administrator.</td>
</tr>
<tr>
<td>Selection Committee</td>
<td>The people that comprise the selection committee, including the chair.</td>
</tr>
</tbody>
</table>