



University of Essex

iTrent User Guide

Recruitment

Panel Member Access Guide

People & Culture - Resourcing Team
March 2021

 iTrent

 Login

User name

Password

Login

 [Contact administrator](#)

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iTrent Recruitment terminology

(required)	<ul style="list-style-type: none">▪ Defines a mandatory field which must be completed before you are able to save the page
Application closing date	<ul style="list-style-type: none">▪ The last day that applicants can submit their application
Appointment type	<ul style="list-style-type: none">▪ The type of interview, e.g. with test or presentation
Bulk application print	<ul style="list-style-type: none">▪ Functionality to download all application forms for the vacancy
Funding approval reference	<ul style="list-style-type: none">▪ The funding approval code received from the Unit 4 system. This can be found on the request to recruit approval PDF document. Post will not normally be advertised without funding approval being in place
Interview booking end date	<ul style="list-style-type: none">▪ The last day the applicant can book their interview slot online through the applicant web recruitment portal. All adverts close at midnight
Interview stage	<ul style="list-style-type: none">▪ Most likely first interview but the interview stage upon which the applicant is at (some could be at second interview)
Lifecycle	<ul style="list-style-type: none">▪ The lifecycle which the vacancy follows in iTrent. This will be UoE standard life cycle unless otherwise specifically stated by the Resourcing Team
People resource	<ul style="list-style-type: none">▪ Another employee who can be assigned against the vacancy and given 'Panel Member' access to review applications in iTrent
Recruiting Manager	<ul style="list-style-type: none">▪ The Hiring Manager who will be carrying out the actions in iTrent for the recruitment campaign for a particular vacancy, not necessarily the reporting (line) manager. This person will have access to the online appointment form in OnBase
Requisition	<ul style="list-style-type: none">▪ The iTrent term for the job vacancy being recruiting to
Requisition Administrator	<ul style="list-style-type: none">▪ Recruiting Managers can assign another member of their team access to create interview schedules and send invitations for their vacancy. This access level is called 'Requisition Administrator'. This person will also have access to the online appointment form in OnBase
Requisition campaign summary	<ul style="list-style-type: none">▪ A summary of the vacancy information, detailing any documentation that has been attached to it and the names of the applicants along with their applications forms
Requisition category/type	<ul style="list-style-type: none">▪ The categorisation for the vacancy, this feeds which section it displays in on the Essex vacancies home page
Requisition processing	<ul style="list-style-type: none">▪ The screen on which applicants can be moved to different stages of the requisition lifecycle e.g. from the shortlisted stage to first interview
Requisition reference	<ul style="list-style-type: none">▪ The unique identifier for the vacancy, this should always be used in communications and when searching in iTrent. A vacancy could have the same title as another, but it will always have a unique reference

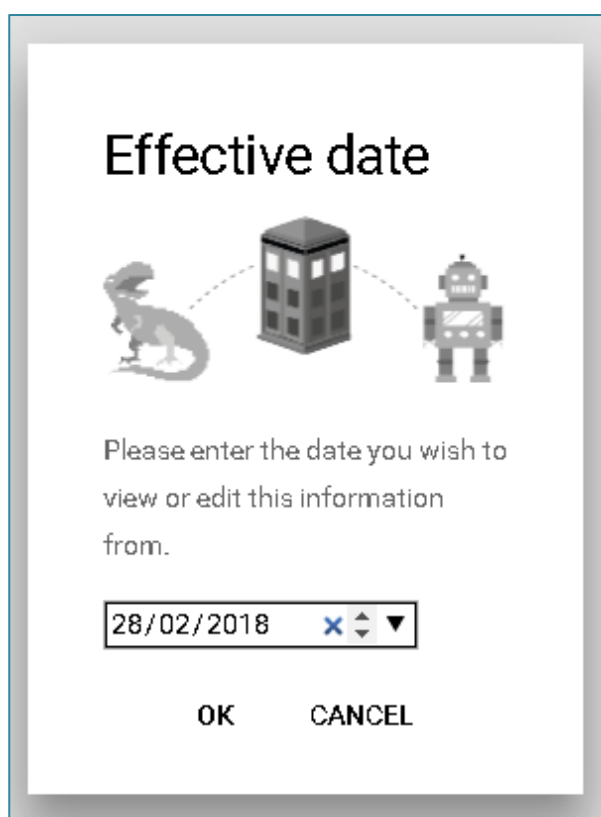
Overview

Using the e-recruitment system, iTrent, panel members have the ability to:

- Upload required documentation
- Monitor the progress of that vacancy (view number of applicants and applications)
- View and download applications (all roles)

What is an effective date?

You can set the date to any time; past, present or future to enable you to create/view the information at that particular point in time. The Panel Member access defaults to using today's date. If you have changed the effective date a quick way to return to today is to click 'cancel'.



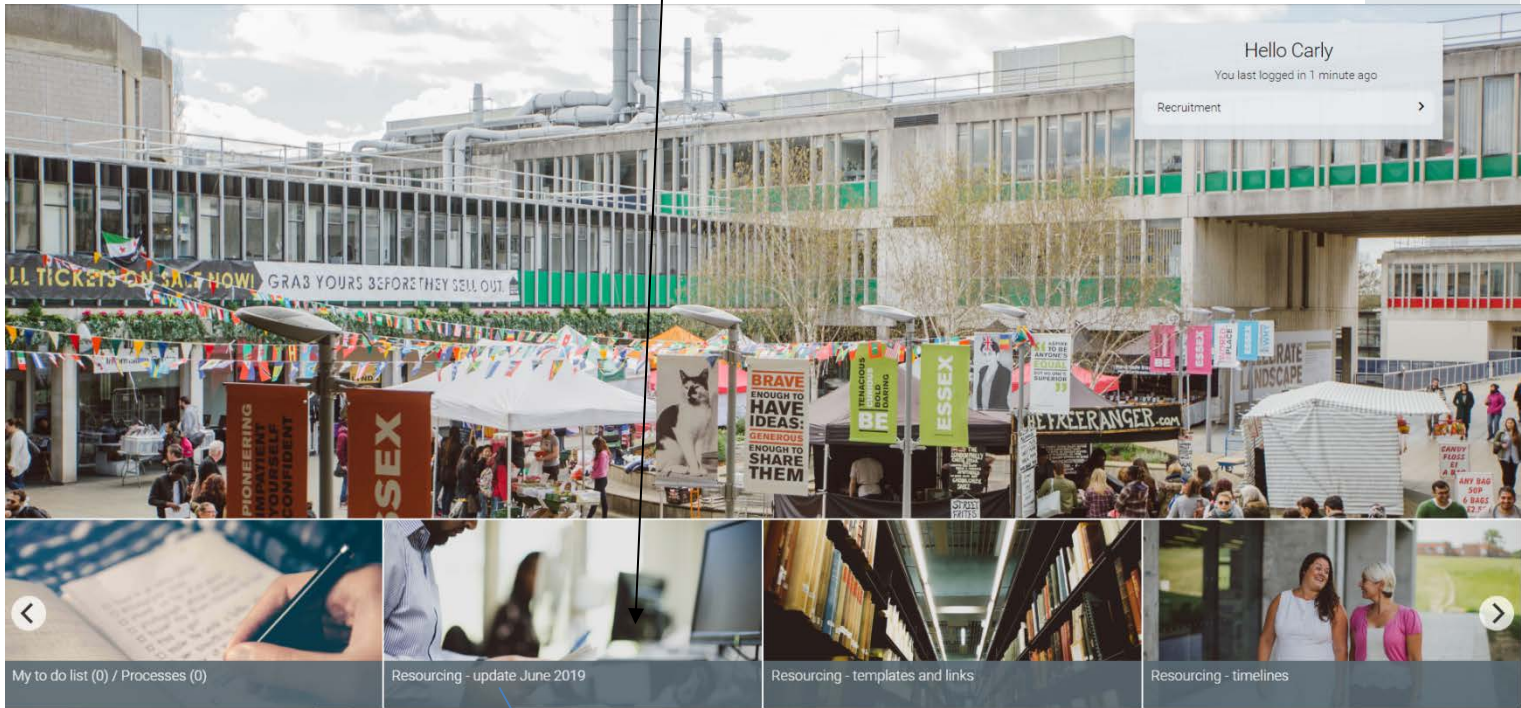
The Home page¹

HOME 12/02/2020 X
ORGANISATION
University of Essex ORG

Click on 'Home' to return to the home point

Click to reveal further information

Menu to access different iTrent accesses and settings



Resourcing - update June 2019

JUNE 2019
Welcome to the Resourcing Team

There have been some changes in recent months to the Resourcing Team:

- Duncan Cline joined as a Resourcing Manager in February 2019
- Katie Taylor, Resourcing Advisor, started her role in May 2019
- Julia Lewis joined the team earlier this month as Resourcing Advisor
- Zoe Smith also joined the team in June 2019 as a Resourcing Assistant

Zoe and Katie will be supporting the team for the next year through the increased Planning Round activity.

From 10 June, some departmental contacts have changed. You can view your Resourcing contacts [here](#).

Hiring Manager

The roll out of the new Hiring Manager access on iTrent enabling managers to have greater control of their recruitment processes is nearly complete, with the majority of Professional Services Sections now using this.

If you would like further guidance on using Hiring Manager, or have any feedback, please contact your Resourcing Advisor.

Planning Round

Earlier this year, the Vice-Chancellor announced the creation of 100 new academic and 50 new professional posts, the largest expansion of staff in our 55-year history.

The first wave of the planning round is well underway, with interviews for some posts already having taken place.

If you have any feedback or suggestions for process improvements regarding next year's Planning Round please email hr@essex.ac.uk.

Staff Directory Articles

There are now [Staff Directory articles](#) on all aspects of the recruitment journey. Both Vacancy Areas to Office of Employment. You will find the Recruitment Guidance and Framework here, as well as all forms you will need during the process.

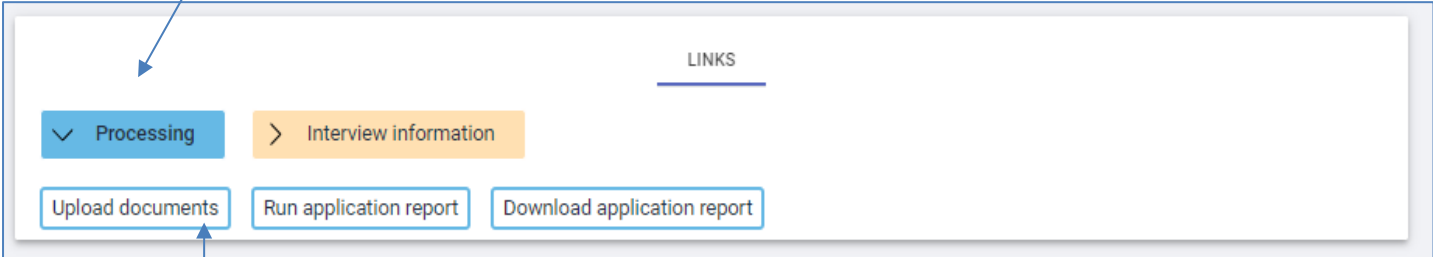
If you feel there is any aspect of guidance/information missing, please contact hr@essex.ac.uk.

¹ Please note that the images on the homepage and carousel may change from time to time.

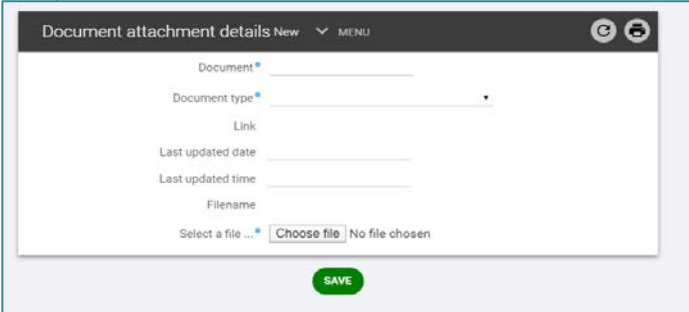
Navigation tips

Once you have entered 'Recruitment' from the Home page, you will find the 'Links' menu. This will give you access to everywhere you need to during the recruitment process.

Click the arrow to reveal relevant shortcut

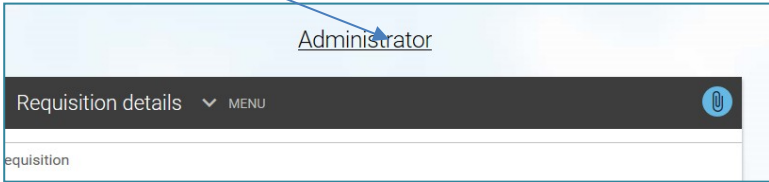


The screenshot shows a 'LINKS' menu with two main sections: 'Processing' (blue) and 'Interview information' (orange). Below these are three buttons: 'Upload documents', 'Run application report', and 'Download application report'. A callout box points to a downward arrow on the 'Processing' button. Another callout box points to the 'Upload documents' button.



The screenshot shows a 'Document attachment details' form with fields for Document, Document type, Link, Last updated date, Last updated time, and Filename. There is a 'Choose file' button and a 'SAVE' button at the bottom.


Clicking on the vacancy title at the top of the page will take you back to the previous screen

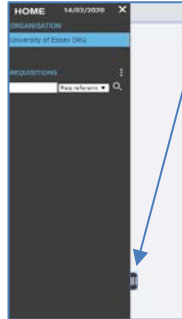


The screenshot shows a page header with the text 'Administrator' and 'Requisition details' with a dropdown arrow and 'MENU'. A callout box points to the 'Administrator' text.

Useful tips for using iTrent

- You may find that the iTrent Panel Member screens appear better when using Google Chrome as a browser
- Shortcut keys
 - Pressing the tab key in a field will move you forward from one field to the next
 - Pressing shift + tab key at the same time will move you backwards from one field to the next
 - Press return key to activate (replaces mouse click)

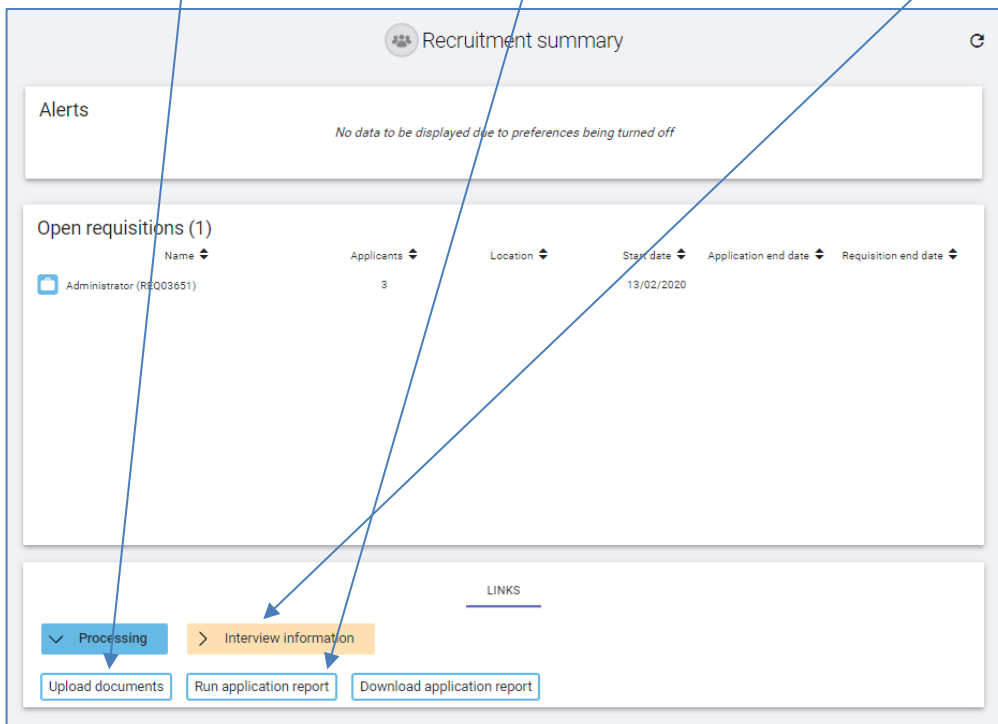
- Wherever you see the magnifying glass  you need to click it to open the database
 - Enter relevant text to search the database
 - Select your choice
 - Press return key to display your selection or select using your mouse
- The side menu can be expanded by clicking on the tab, here



- Requisitions all have a unique requisition number associated with them, so if you need to search for a post you may wish to change your preferences so that the search field defaults to requisition number. You can do this by clicking on the face icon in the top right-hand corner of the screen, selecting 'My preferences', then clicking on the + next to the word 'Defaults', and changing the 'requisition' search field to 'REQ reference' then clicking 'Save'

How do I view current vacancies?

You can view the progress of any requisitions you have panel member access to at any point in the recruitment process. From the 'Home' page, select 'Recruitment'. This will take you through to your 'Recruitment Summary' page. From this page you can see all open vacancies that you have access to and the links to upload documentation, view/print application forms and view booked interview slots.



To view the progress of any requisitions which are currently being advertised, click on the relevant post in the 'Open requisitions' box:

Name	Applicants	Location	Start date	Application end date	Requisition end date
Administrator (REQ03651)	3		13/02/2020		

Applicants within the iTrent system show in stages, which will indicate which part of the recruitment process they are currently at. While the advertising is still in process, applicants will appear as 'Stage 1a: web applicant'. The morning after the advert has closed the Resourcing Team will move all applicants to 'Stage 2a: Shortlisting' and once they have been invited to interview, the stage will change again to 'Stage 3a: First interview'.

Manage applicants						
STAGE 1A: WEB APPLICANT (1)	STAGE 2A: SHORTLISTING (1)	STAGE 3A: FIRST INTERVIEW (1)	STAGE 4A: SECOND INTERVIEW (0)			
Applicant details	Attachments	Current Salary	Location	Notice Period	Stage notes	
Mandy Fox (APP00574) External Applied on 14/02/2020	No documents				No notes	

Manage applicants						
STAGE 1A: WEB APPLICANT (1)	STAGE 2A: SHORTLISTING (1)	STAGE 3A: FIRST INTERVIEW (1)	STAGE 4A: SECOND INTERVIEW (0)			
Applicant details	Attachments	Current Salary	Location	Notice Period	Stage notes	
Nicola Owen (APP17263) External Applied on 14/02/2020	No documents				No notes	

To view an application form, click on the 'All docs' icon next to the name of the applicant, and the 'application print'. The application form will download to the bottom left hand corner of your screen.

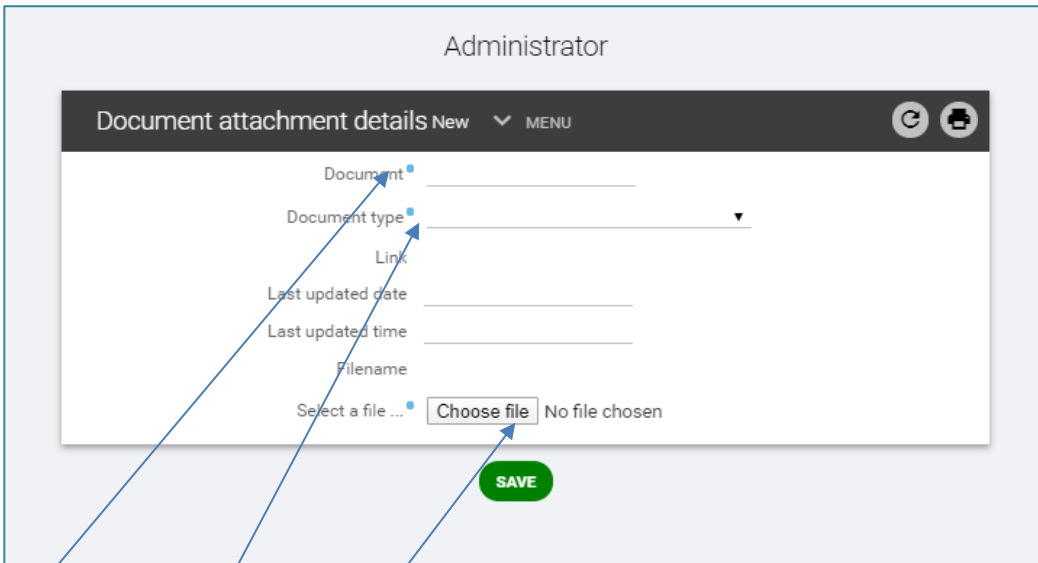
Manage applicants						
STAGE 1A: WEB APPLICANT (1)	STAGE 2A: SHORTLISTING (0)	STAGE 3A: FIRST INTERVIEW (0)	STAGE 4A: SECOND INTERVIEW (0)			
Applicant details	Attachments	Current Salary	Location	Notice Period	Stage notes	
Jamie Jones (APP19700) External Applied on 14/02/2020	ALL DOCS				No notes	

How do I view, upload and download documentation?

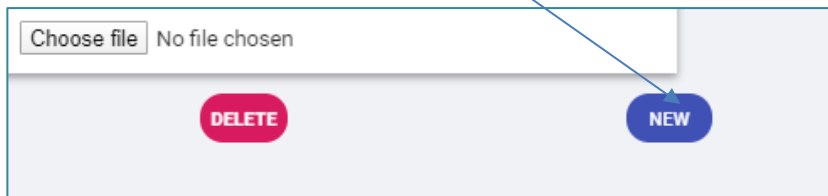
If you are required to upload any documentation (for example shortlisting or interview decision grids), you can do this from the 'Links' menu. Click on 'Processing' and then 'Upload documents' from the 'Links' menu.



1. Enter the fields as shown on the below to upload all of your supporting documentation.



- **Document (required):** This is the name of the document, for example Funding Approval or Job pack
- **Document type:** Select the relevant option from the drop down
- **Select a file:** Click on 'Choose file' and upload the document from your computer, and click 'Save'
- To upload a second document, click on the 'New' button that will appear once you have clicked save and repeat the steps above



2. If you haven't already done so, return to the Requisition screen and tick the 'Requisition Complete' box, and 'Save'.

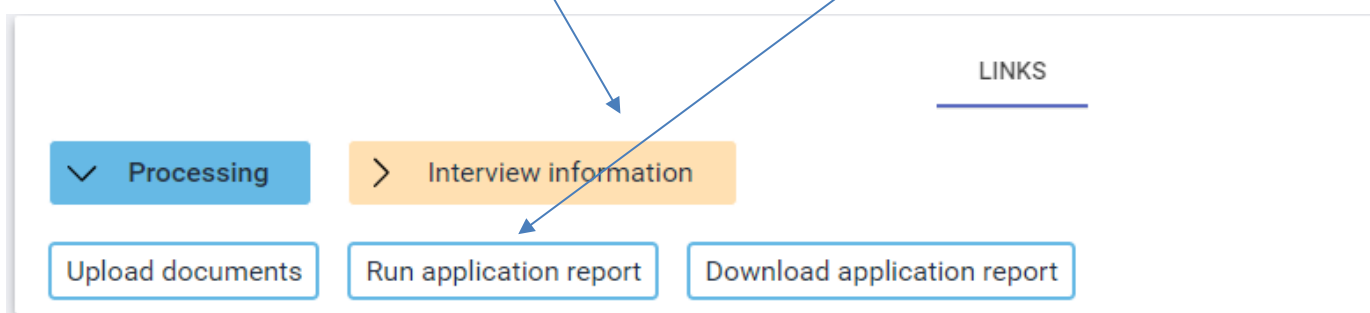
What happens once the post has closed?

The morning after the post has closed the Resourcing Team will email the Hiring Manager, Requisition Administrator and any Panel Members with a post closed email containing the shortlisting grid and a reminder of next steps.

Shortlisting should take place as soon as the panel can convene. [Guidance on shortlisting](#) is available. The Chair of the shortlisting panel should upload the shortlisting decision grid as soon as it is completed.

How do I download the applications?

From the 'Links' menu, select 'Interview information', and then 'Run application report'.

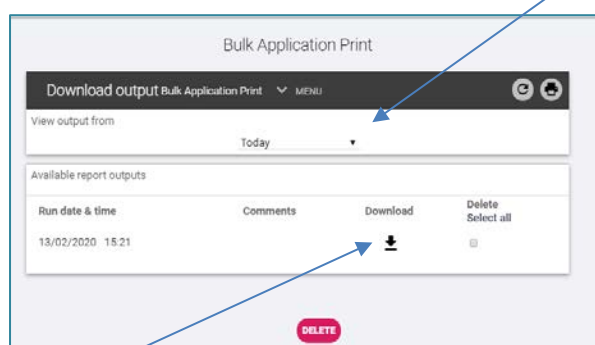


Professional services (Sections and Departments) requisitions

1. Click on the magnifying glass, enter your requisition number or name in the pop up box and click on the magnifying glass.
2. Click 'Search'.
3. A list of your applicants will appear; only tick those that you want to **exclude** from the download. If you have a large number of applications, you may find it helpful to click on the tick under the word 'exclude' and then deselect those you wish to print.
4. Click on 'Run' at the bottom of the screen. You will see a message which reads 'Generating report Bulk application print. You will be notified upon its completion'
5. Once the report has been generated, you will receive an email to say "Report Bulk Application Print" has completed, and a blue notification bell will appear next to your side menu.

 Bulk recruitment document download – completed

6. Click on 'Download application report' in the 'Links' menu.
7. You will be shown a list of your bulk downloads from today (to see older downloads you can change the 'View output from' dropdown menu accordingly).



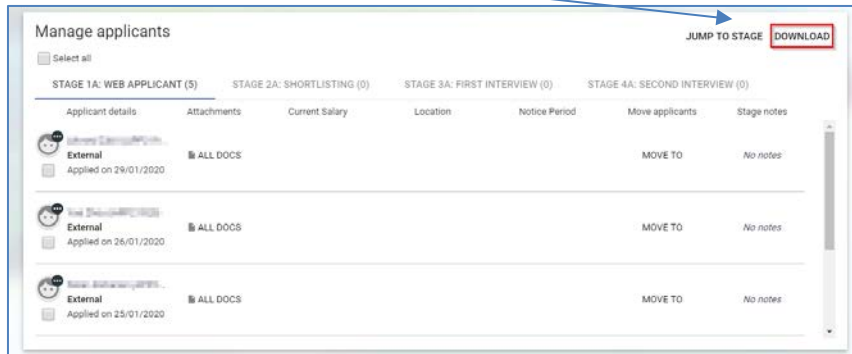
8. Click on the download icon next to the report you wish to view.

9. This will open as a PDF in the left-hand corner of your screen. From here you can view, save and print the applications.

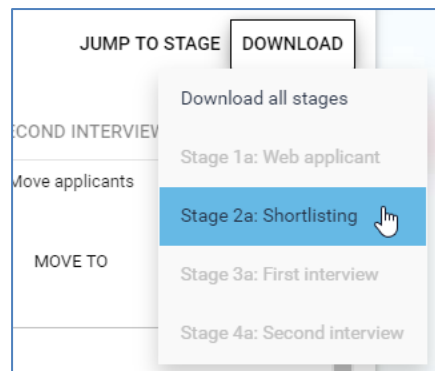
Academic requisitions

1. Click on the relevant requisition.

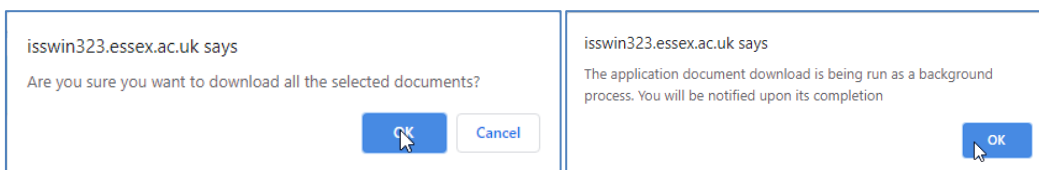
2. Click on the 'Download' button.



3. Select the stage you wish to download from (for example Stage 2a: Shortlisting).



4. When prompted, select 'ok' twice.

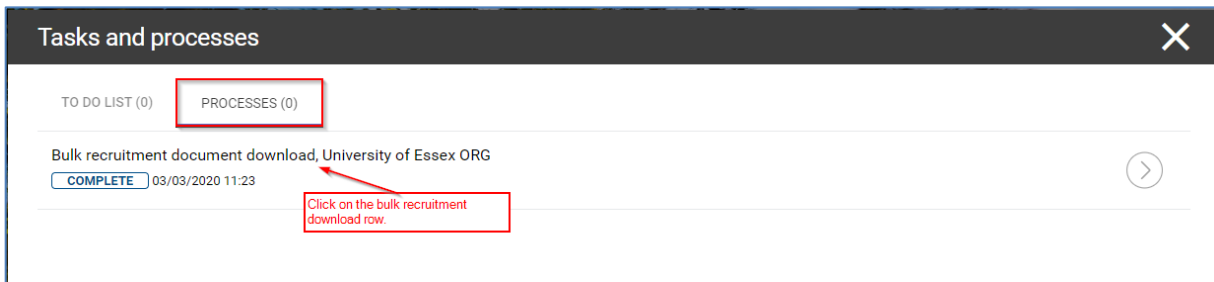


5. Click on the 'Home' button to return to the Home screen.

6. Click on the 'My to do list/processes' box.



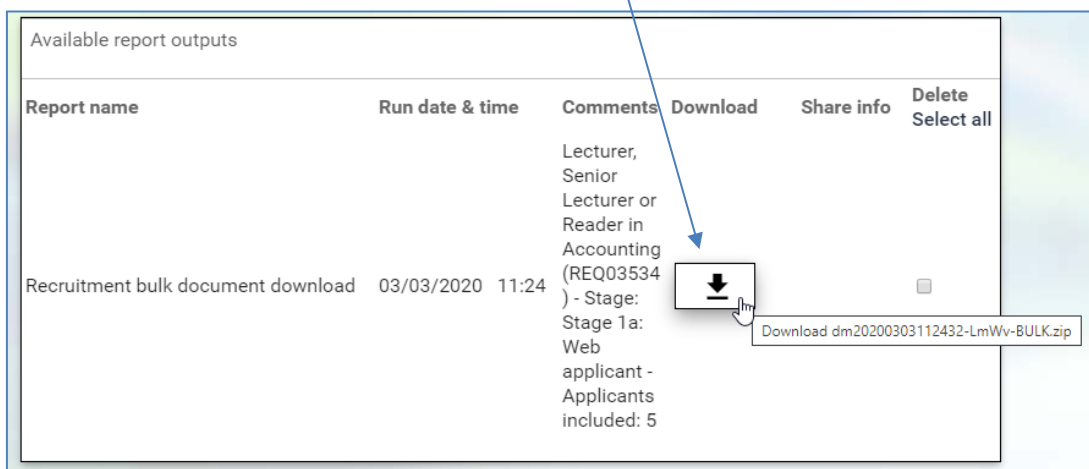
7. Click on the 'processes' heading.



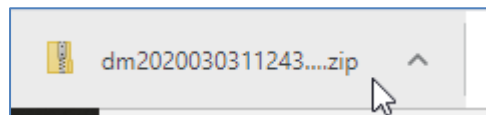
8. Click on the bulk recruitment document download.

9. If there are multiple downloads showing, check the date and time showing to ensure you have the correct one.

10. On the download output screen, click on the download arrow next to the date and time of your report.

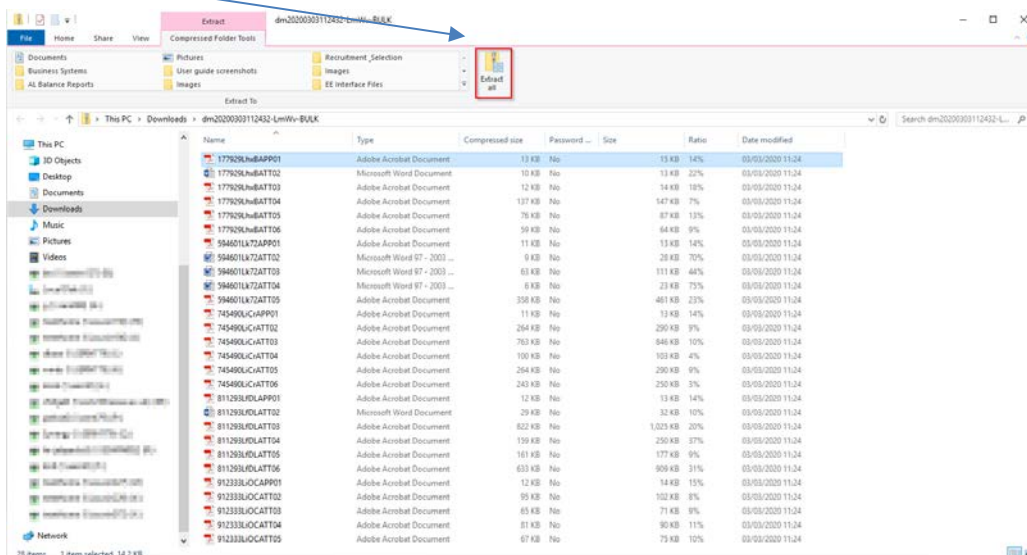


11. Wait for the download to complete (if in Chrome there will be a pop up at the bottom left of the screen).



12. Open the zip file.

13. Extract and save or print the application forms (whatever is required).



How do I monitor interview bookings?

Once the interview booking end date has passed you will be sent an interview schedule by email showing all candidates who have booked a slot (usually 2 working days prior to the interviews). If you wish to check the progress of the bookings prior to receiving your final schedule you should follow the steps below:

- From the 'Links' menu select 'Interview information' and then 'Interview booking information'
- Either click on the relevant open requisition from the box above, or search for it in the side menu
- A list of candidates will appear in the side menu. If you hover the cursor over each candidate you will see the details of their booking, or click on them to display in the main part of the screen. If they have not yet booked an interview slot, only their name and interview stage will show

NOTE: For Professional Service Section roles, once the interview schedule is confirmed the Hiring Manager or Requisition Administrator will send a final schedule to the full interview panel and to the main University reception (if you have asked candidates to report there). For Departmental roles, the Resourcing Team will carry out this process.

What do I do following the interviews?

Following Professional Service role interviews, the Chair should contact their Resourcing Adviser prior to making the offer to the successful candidate. Academic offers should be approved by either the Executive Dean, Vice-Chancellor or their delegate.

The signed, completed interview decision grid should be uploaded to iTrent, and the [online appointment form](#) completed (plus right to work documentation attached if applicable). If you are required to do this, follow the steps below:

- From the 'Links' menu, select 'Appointments'
- Click on 'Upload interview decision grid'
- In 'Document' enter the name of the document you are uploading
- Select the relevant document type from the drop down list
- Upload the document from your computer
- Click 'Save'
- To upload another document, click 'New' and repeat the steps above

What other support is available?

You will find useful templates and links on the pages you will access frequently. On the 'Home' page the carousel across the bottom has document templates, user guides, and timelines and contact details.

There is guidance on all stages of the recruitment process on the [Staff Directory](#).

Guidance on the use of the online appointment form, through OnBase, can also be found on the [Staff Directory](#).

For further support contact your [Resourcing Adviser](#).