



Shortlisting

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This section describes how panel members should use the system to shortlist applications.

1. You will have been attached to the vacancy as a panel member at the time the vacancy was published.
2. You should have received a system notification when the vacancy was published, as well as a notification when the post closed inviting you to shortlist.

Please note: You can access the applications before the post closes although you should not submit your final decisions until the post closes and you have seen all the applications.

Logging in to the system as a Panel Member


There are two routes to log-in to the system depending on the type of user you are. If you are an LSE member of staff, you should log-in to the system following the instructions as set out in the section [‘Logging in with an LSE username and password’](#).

If you are working at LSE as an agency worker, or a contractor you will need to be given a username and password by your HR Adviser. You should then log-in to the system following the instructions as set out in the section [‘Logging into the system as an external panel member’](#).

Logging in with an LSE username and password

1. Open a browser and type in the URL <https://jobs.lse.ac.uk/secure/ShibAuth.aspx>.
You will now see the LSE screen below.
2. Enter your **LSE username** and **password** in the log-in box

Note: you will only be able to log-in to the system using this link if you have an LSE username and password. If you have been given an external username and password, you will need to log-in another way. Please see the section on logging in as an external user



LSE Identity Provider

Login using your LSE username and password:

Username:


Password:

[Forgot username or password](#) | [Login Help](#) | [Cookies?](#)


LSE Central Authentication Service

For security reasons, please LOG OUT and CLOSE ALL browser windows when you are finished accessing services.

You will then see a page like this:



Jobs



you are page Logged in as: user@lse.ac.uk Logout

[Home](#) [Panel Home](#) [Search](#) [My Settings](#) [Vacancies](#) [Approval Request](#) [Interviews](#) [Reports](#) [FAQs](#)

Candidates per Application Stage

Vacancy Live Status:

Active Stages	New	Overall
Registered not submitted	0	94
New submitted application/shortlisting	0	1
Withdrawn Application	0	2
Regret after shortlisting	0	181
Invite to interview	0	2
Interview confirmed	0	3
Regret after interview	0	3
Written offer accepted, new starter form complete	0	2
Total	0	288

Number of Applications by Vacancy

Vacancy Live Status: Vacancy Status: Vacancy Title: Vacancy ID:

Vacancy Name	Live status	Status	Closing date	New	Overall
<input type="checkbox"/> HR Manager, Pensions Administration	Not Live	Interview	19/02/2	0	13
<input type="checkbox"/> HR Adviser	Not Live	Interview	19/02/2	0	5
<input type="checkbox"/> HR Administrator	Not Live	Offer	21/02/2	0	270

Page size: 10 3 items in 1 pages

Search Candidates

[Advanced Search](#)

Search and Filter Applications

Channel:

Job Type:

Area:

Sub-Area:

Salary:

Vacancy Type:

Contract Type:

Mode of Work:

Method of Recruitment:

HR Adviser Name:

HR Administrator Name:

Schedules

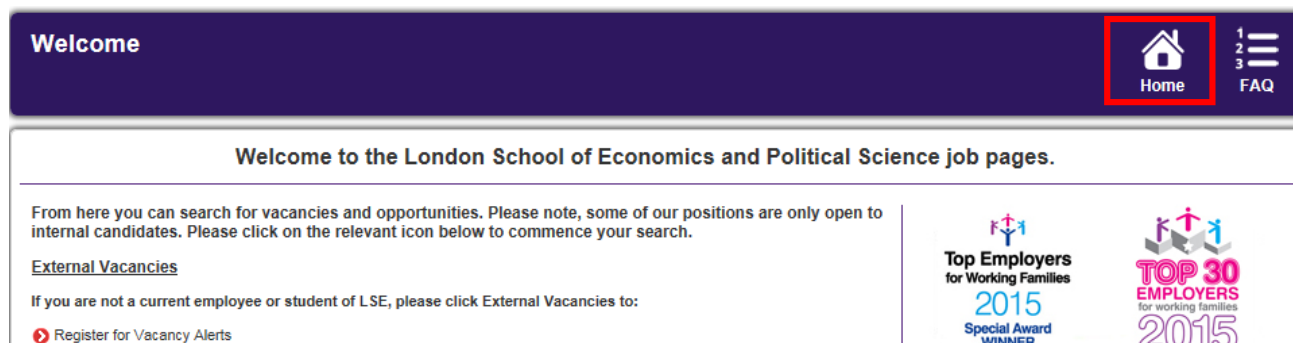
Approved Vacancies

javascript:_doPostBack('ctl00\$ctl00\$Cph1\$Cph1\$VchHPnl\$C\$VacStages\$VacG...
11:30

Logging in to the system as an external panel member

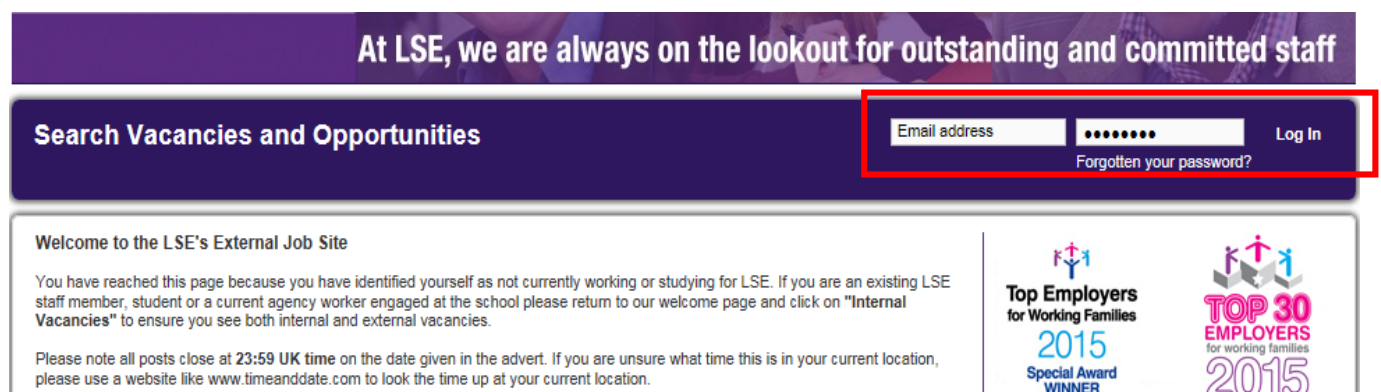
LSE users will normally access the online recruitment system using their own LSE username and password. However, if you have been provided with a username and password for the system by a member of the HR team, you will be able to log-in as follows:

1. Open a browser and type in the URL **jobs.lse.ac.uk**.
You will now see the welcome screen below.
2. Click on the **Home** button.



This is the log-in screen for all users, including candidates.

3. Enter your **username** and **password** in the log-in box



You will then see a page like this:

LSE Jobs

Home Panel Home Search My Settings Vacancies Approval Request Interviews Reports FAQs

Candidates per Application Stage

Vacancy Live Status: ☐ All ☐ Search

Active Stages	New	Overall
Registered not submitted	0	94
New submitted application/shortlisting	0	1
Withdrawn Application	0	2
Regret after shortlisting	0	181
Invite to interview	0	2
Interview confirmed	0	3
Regret after interview	0	3
Written offer accepted, new starter form complete	0	2
Total	0	288

Search and Filter Applications

Channel:

Job Type:

Area:

Sub-Area:

Salary:

Vacancy Type:

Contract Type:

Mode of Work:

Method of Recruitment:

HR Adviser Name:

HR Administrator Name:

Number of Applications by Vacancy

Vacancy Live Status: ☐ All ☐ Vacancy Status: Vacancy Title: Vacancy ID:

Vacancy Name	Live status	Status	Closing date	New	Overall
HR Manager, Pensions Administration	Not Live	Interview	19/02/2	0	13
HR Adviser	Not Live	Interview	19/02/2	0	5
HR Administrator	Not Live	Offer	21/02/2	0	270

Page size: 3 items in 1 pages

Search Candidates

[Advanced Search](#)

Partial screenshot of mouse.click

javascript:_doPostBack('ctl00\$ctl00\$Cph1\$Cph1\$VcHPnl\$CS\$VacStages\$VacG...'

Starting your Shortlisting

After you have logged onto the system, click on the **Panel Home** tab

The screenshot shows the 'Panel Home' tab selected in the top navigation bar. Below the navigation bar, there's a section titled 'Number of Applications by Vacancy' with filters for 'Vacancy Live Status' (All), 'Vacancy Status' (All), 'Vacancy Title', and 'Vacancy ID'. A 'Search' button is present. Below this, there's a 'Candidates per Application Stage' section with a 'Search' button and a table showing 'Active Stages' with columns for 'New' and 'Overall'. The table shows 'No records to display.' and a 'Total' row with '0' in both columns. To the right, there's a 'Search and Filter Applications' section with various dropdown filters: Channel, Job Type, Area, Sub-Area, Salary, Vacancy Type, Contract Type, Mode of Work, Method of Recruitment, HR Adviser Name, and HR Administrator Name. A 'Search' button is at the bottom of this section. At the very bottom, there's a 'Schedules' section with a dropdown arrow.

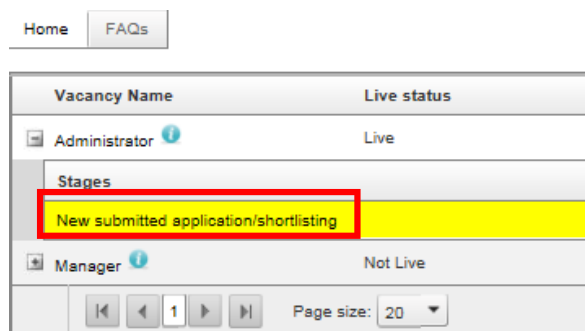
1. You will then see that you have **new applicants** to shortlist highlighted in **yellow**.

You will also be able to see how many applications have been submitted overall, and how many new ones have been received since you last viewed them.

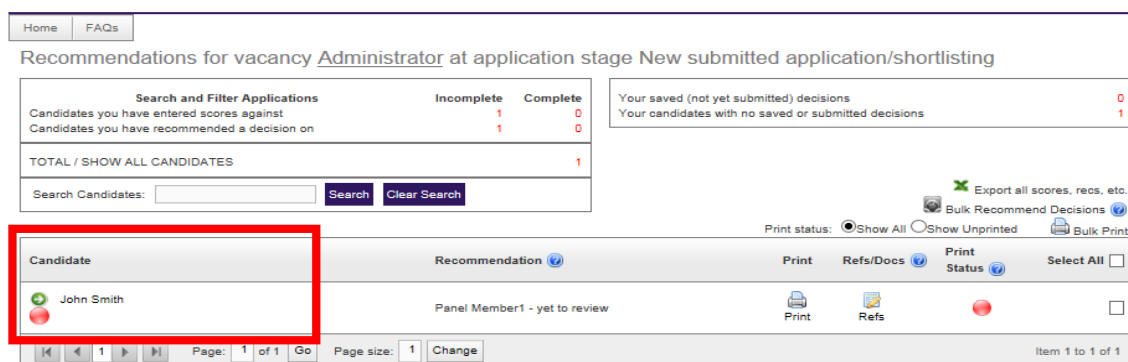
The screenshot shows a table with columns: Vacancy Name, Live status, Status, Closing date, New, and Overall. The table has two main rows: one for 'Administrator' (Live, Shortlisting, 14/01/2016, 1 New, 1 Overall) and one for 'Manager' (Not Live, Filled, 21/12/2015, 1 New, 5 Overall). The 'Administrator' row has a 'Stages' sub-section with a highlighted row for 'New submitted application/shortlisting' (1 New, 1 Overall). The 'New' and 'Overall' columns for this row are highlighted in yellow. At the bottom, there's a pagination bar with 'Page size: 20' and a '1' button.

Vacancy Name	Live status	Status	Closing date	New	Overall
Administrator	Live	Shortlisting	14/01/2016	1	1
Stages					
New submitted application/shortlisting				1	1
Manager	Not Live	Filled	21/12/2015	1	5

2. Click on the **New submitted application/shortlisting** link and you will be taken to a screen showing the names of the candidates who have applied. In this example, there is one candidate application.



3. Click on the **candidate's name** to view the application.



- A split screen will appear, showing the candidate's application on the left side and the shortlisting grid on the right side.

[Home](#)
[FAQs](#)

You can save your scores/notes at any time. If saving, you will need to return to submit your recommendation

Click Submit when you have finished the review process. This will submit your recommendation and accompanying notes

Save

Submit

Candidate	Vacancy	Recommendation	Refs/Docs	Print Status
John Smith	Administrator	Panel Member1 - yet to review	Refs	

Step 1: Review the application

06/01/2016 16:10:04

Vacancy Name: Administrator
 Candidate Name: John Smith
 Candidate Id: 3482091
 Vacancy ID: 11

Personal Details

Title: Mr
 First name: John
 Known as:
 Surname: Smith
 Middle Name(s):
 Currently residing in the UK: Yes
 Address Line 1: 1 The Street
 Address Line 2:
 Address Line 3:
 Address Line 4: London
 Postcode: W1 1AA
 Country: United Kingdom
 Preferred contact number: 07777 888 999
 Preferred contact number type: Mobile phone No
 Alternative phone number:
 Please select alternative phone number type:
 E-mail address: john@test.com
 What is your LSE ID Number?: N/A
 Are you a current LSE student?: No
 To help us monitor the effectiveness of our advertising please let us know where you saw the

Step 2: Enter in notes/scores

Shortlisting Criteria

0 - Doesn't meet criteria
 1 - Does meet criteria

Please select '0' if the candidate does not meet the criteria or select '1' if the candidate does meet the criteria. Only those who meet all the essential criteria should be shortlisted.

Knowledge and experience


Communication

Step 3: Your recommendation






Recommended stage

Additional comments

5. Use the **scroll bar** to the right of the application to read the candidate's application or click the **grey arrow** to expand the window

Candidate	Vacancy	Recommendation
 John Smith	Administrator	Panel Member1 - yet to review

Step 1: Review the application

Last name: Brown
First name: Fred
Job title: Manager
Address Line 1: University of Kent
Address Line 2:     
Address Line 3:
Address Line 4: Kent
Postcode: KT10 1PP
Phone: 01234 678 901
Email Address: fred.brown@kent.com
Capacity in which known to you: Line Manager
Contactable: Yes

Page 2

John Smith
1 The Street
London
W1 1AA

1 January 2016

Dear Sir/Madam

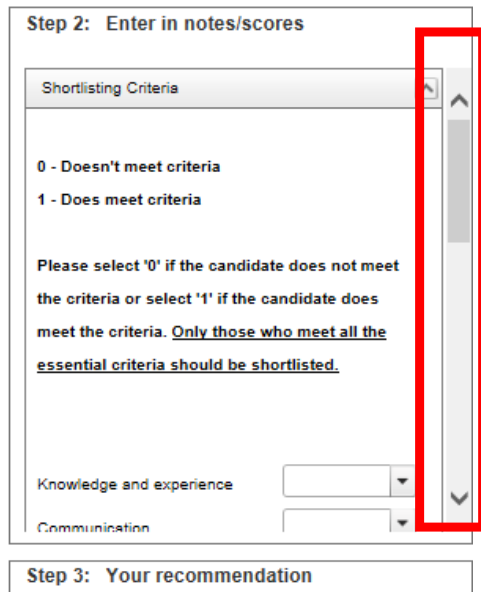
I write with reference to the post of Administrator in the Library which was advertised on your online recruitment system.

I was very interested in this role and I think I have good skills and experience which I can bring to it. I have given examples of how I meet the criteria on the person specification below.

Knowledge and experience

I have worked in the library at the University of Kent for two years whilst studying on my course in Business Administration. I was responsible for covering the reception desk, giving advice to

6. Use the **scroll bar** to the right of the shortlisting grid to view the competencies.



Step 2: Enter in notes/scores

Shortlisting Criteria

0 - Doesn't meet criteria
1 - Does meet criteria

Please select '0' if the candidate does not meet the criteria or select '1' if the candidate does meet the criteria. Only those who meet all the essential criteria should be shortlisted.

Knowledge and experience

Communication

Step 3: Your recommendation

7. If the candidate does not demonstrate he or she meets the essential criteria insert a '0' next to the competency. If the candidate does meet the criteria, insert a '1'.

TIP: Remember, if the candidate does not demonstrate he or she meets the first criteria you can reject them from the shortlist and you do not need to consider them any further.

Knowledge and experience

Communication



8. Use the '**recommendation**' section to record your decision as to whether you would like to shortlist the candidate or not.

Step 3: Your recommendation

Recommended stage

Invite to interview

Longlist

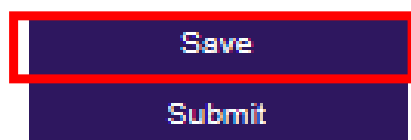
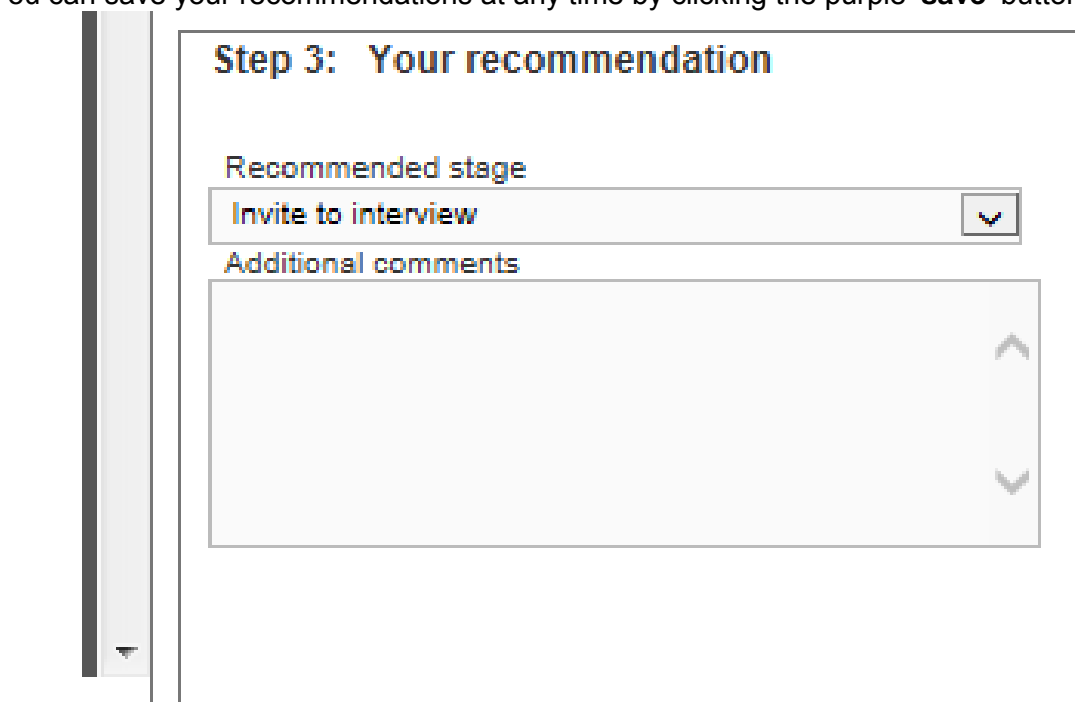
Regret after shortlisting

Reserve after shortlisting

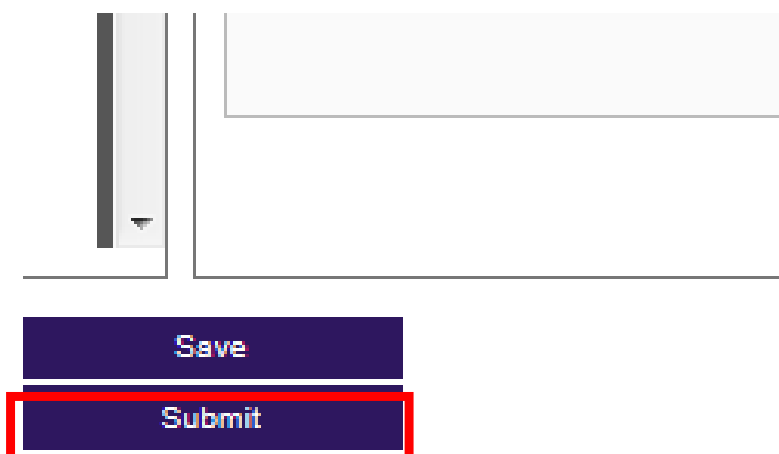
Withdrawn Application

9. Use the comments box to write any notes to remind you later as to why you decided to shortlist/not shortlist. Do remember that applicants can request to view any notes that are made about them and so ensure that anything you write is according to the person specification criteria.

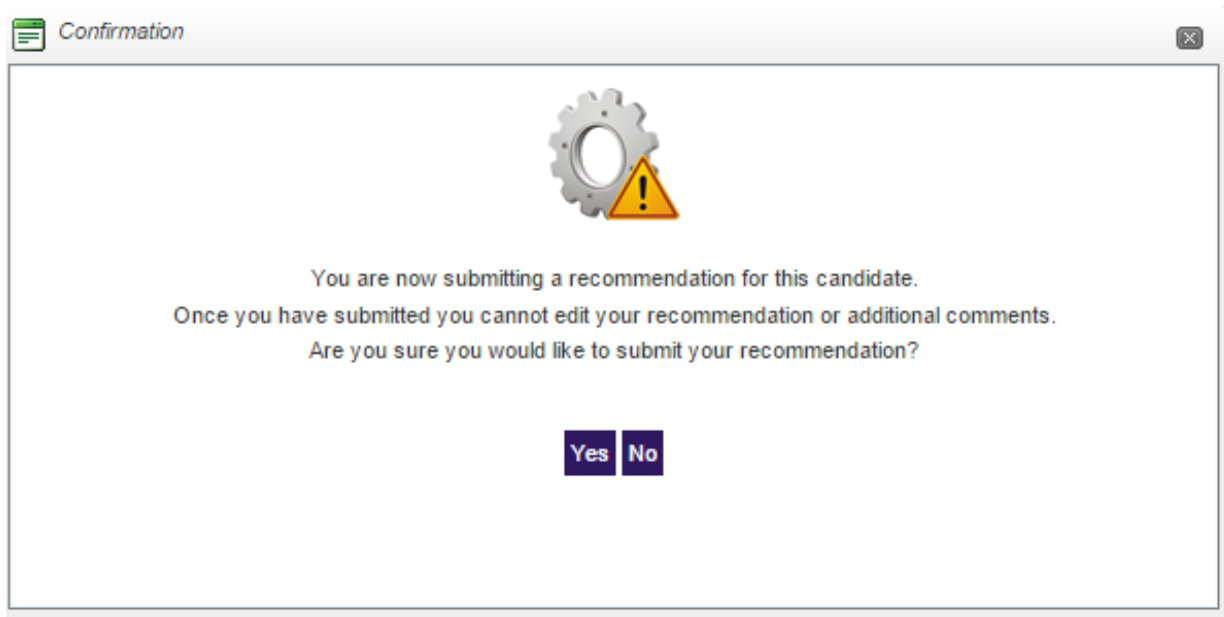
You can save your recommendations at any time by clicking the purple '**save**' button



10. Once you have saved a recommendation, you will be taken back to the main list of candidates so that you can move onto the next one. When you are ready to submit your final shortlist decision, click the purple '**submit**' button.



11. You will see a pop-up window asking if you are sure you would like to submit your scores.



IMPORTANT NOTE: Once you have submitted your scores you will not be able to go back and change them later. Therefore, please ensure that you only submit your scores once you have made your final decision.

Submitting your Shortlist

1. You will need to submit a recommendation for each candidate who has applied in order to progress to the next stage in the process.
2. If you are the Chair of the panel, you should not submit your recommendations until all other panel members have submitted theirs. If you submit your recommendations before other panel members have done so, they will no longer be able to submit their recommendations through the system. In addition, once the Chair submits their decisions, any candidates who are at the Regret after Shortlisting stage will receive an automatic email notifying them that they have been unsuccessful. Please see the section on **Sending Automatic Emails to Unsuccessful Candidates** below for more information.

Remember:

- Have you considered all candidates against the essential criteria?
- Do you have reasons why candidates do or do not meet the criteria?
- Have you guaranteed an interview to all those who have opted into the Two Ticks Scheme?
- Has the Chair confirmed the final shortlist?

Using Engage ATS to Confirm the Final Shortlist

It is the role of the Chair of the panel to confirm the final shortlist.

1. If you are the Chair of the panel, you should consider the applications yourself first and come to your own decision about which applicants meet the essential criteria. You can log-in to the system and shortlist the applicants following the instructions set out under Section 4: Shortlisting, above.
2. Once you have done this, you should take into account the decisions made by other panel members. You will be able to see who the panel members are and whether they have submitted their scores for each candidate by looking at the Recommendation column in the middle of the screen

The screenshot displays the Engage ATS interface for reviewing applications. At the top, there are navigation tabs: Home, Vacancies, Approval Request, and FAQs. Below this is a header for 'Recommendations for vacancy Administrator at application stage New submitted application/shortlisting'.

On the left, a 'Search and Filter Applications' section shows a table with columns 'Incomplete' and 'Complete'. The table lists four categories: 'Candidates the Panel has entered scores against' (0 Incomplete, 1 Complete), 'Candidates the Panel has recommended a decision on' (1 Incomplete, 0 Complete), 'Candidates you have entered scores against' (1 Incomplete, 0 Complete), and 'Candidates you have recommended a decision on' (1 Incomplete, 1 Complete). Below this table is a 'TOTAL / SHOW ALL CANDIDATES' row showing 1 candidate.

On the right, a summary box shows 'Your saved (not yet submitted) decisions' as 0 and 'Your candidates with no saved or submitted decisions' as 1.

The main area shows a candidate named 'John Smith'. A red box highlights the 'Recommendation' column, which lists three items: 'Panel Member1 - yet to review', 'Con Venor1 - yet to review', and 'Panel Member2 - Invite to interview'. To the right of the candidate name, there are buttons for 'Print', 'Refs/Docs', 'Print Status', and 'Select All'.

At the bottom, there is a pagination bar showing 'Page: 1 of 1' and 'Page size: 1'.

Note: on this example, the panel members are showing as **Panel Member 1** and **Panel Member 2**, and the Chair is showing as **Convenor 1**. However in reality you will see the actual names of the panel members. This will enable you to follow up with the panel members directly outside of the system should you wish to do so.

3. You make your recommendations on behalf of the panel using the **Bulk Recommend Decisions** feature as described in Section 4: Shortlisting, above.

Sending Automatic Emails to Unsuccessful Candidates

The system is set up so that as soon as a candidate is moved to the **Regret after Shortlisting** stage by the **Chair** of the panel and he/she clicks **Submit**, the candidate will be sent an automatic email informing them that they have been unsuccessful.

Please note that if a panel member moves a candidate to the Regret after Shortlisting stage, this will only be seen by the Chair of the panel and candidates will not receive an email notifying them that they have been unsuccessful.

Viewing a Summary of Panel Member Shortlists

If you would like to view a summary of the other panel members' shortlists you can do so by selecting all the candidates and clicking the 'export all scores, recs' link

Home Vacancies Approval Request FAQs

Recommendations for vacancy Administrator at application stage New submitted application/shortlisting

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

TOTAL / SHOW ALL CANDIDATES 1

Search Candidates:

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

Print status: ☒ Show All ☐ Show Unprinted

Candidate	Recommendation	Print	Refs/Docs	Print Status	Select All
John Smith	<ul style="list-style-type: none">Panel Member1 - Invite to interviewCon Venor1 - yet to reviewPanel Member2 - Invite to interview	<input type="button" value="Print"/>	<input type="button" value="Refs"/>	<input type="button" value="Print Status"/>	<input checked="" type="checkbox"/>

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

The '**Candidate Export**' window will appear as shown below.

- Click the purple '**Download**' button and save the file to your PC. Please ensure that you save the file in a secure location and is kept confidential.

Candidate Export

Choose format:

☐ CSV ☒ Excel

Choose a file name:

- Open the file from your PC and you will see a spreadsheet showing the names of the applicants and the recommendations and scores of each panel member.

File Home Insert Page Layout Formulas Data Review View Add-Ins										
Clipboard		Font		Alignment		Number		Styles		Cells
A5		CandidateID								
1	<u>Vacancy: Administrator</u>									
2	Panel Members: Panel Member1, Panel Member2									
3										
4										
5	<u>CandidateID</u>	<u>Forename</u>	<u>Surname</u>	<u>Recommendation</u>	<u>Notes</u>	<u>Saved/Submitted</u>	<u>Reviewer</u>	<u>Score Total (Shortlisting Criteria)</u>	<u>Shortlisting Criteria: Knowledge and experience</u>	<u>Shortlisting Criteria: Communication</u>
6	3482091	John	Smith				Con Venor1			
7				Invite to interview		Submitted	Panel Member1	14.00	1.00	1.00
8				Invite to interview		Submitted	Panel Member2	2.00	1.00	1.00
9										
10										
11										
12										
13										

Please note: It may be that you all select the same candidates for the shortlist and so all you will need to do is to simply confirm the names via Engage ATS. However, if there is a difference of opinion it is advisable to hold a shortlisting meeting with the other panel members to discuss their shortlists and come up with an agreed final shortlist. In that event, the shortlisting decisions that you submit via Engage ATS should be the same as the agreed final shortlist on behalf of the panel.

Downloading a manual shortlisting grid from Engage ATS

1. Log-in to Engage ATS and find the vacancy you would like to create a manual shortlisting grid for. In this example we will use the '**Administrator**' vacancy shown below.

Number of Applications by Vacancy Grid Settings

Vacancy Live Status: ☒ All ☐ Vacancy Status: Vacancy Title: Vacancy ID:

Vacancy Name	Live status	Status	Closing date	New	Overall
HR Analyst	Not Live	Published	07/01/2016	0	1
Administrator	Live	Shortlisting	14/01/2016	0	2
Administrator	Not Live	Published	Ongoing	0	0
Administrator	Not Live	Published	Ongoing	0	0
Manager 2	Not Live	Published	23/12/2015	0	2
Associate Manager	Not Live	Published	21/12/2015	0	0
Manager	Not Live	Filled	21/12/2015	0	5
Associate Professor in Economics	Not Live	Published	21/12/2015	0	0

Page size: 10 8 items in 1 pages

Candidates per Application Stage

Vacancy Live Status: ☒ All ☐

Active Stages	New	Overall
Application submitted	0	2
Registration	0	2
Registered not submitted	0	2
New submitted application/shortlisting	0	2
Invite to interview	0	1
Ready for ResourceLink	0	1
Total	0	10

Search Candidates

Search and Filter Applications

Channel:

Job Type:

Area:

Sub-Area:

Salary:

Vacancy Type:

Contract Type:

Mode of Work:

Method of Recruitment:

2. Expand the vacancy and click on the '**new application submitted/shortlisting**' link to view the list of candidates who have applied for the vacancy. In this example, there is one candidate.

Vacancy Live Status: ☒ All ☐ Vacancy Status:

Vacancy Name	Live status
HR Analyst	Not Live
Administrator	Live

Stages

Application submitted

3. Select the names of the candidates that you would like to include in the shortlisting grid by checking the box next to their name.

The screenshot shows the 'Search Candidates' interface. At the top, there are navigation controls: 'Page: 1 of 1', 'Go', 'Page size: 1', and 'Change'. Below this is a table with columns: 'Candidate', 'Details', 'Process', and 'Select'. The 'Candidate' column shows 'John Smith' with a profile icon. The 'Details' column shows 'Vacancy Name: Administrator', 'Application Stage: New submitted application/shortlisting', 'Registered on: 06/01/2016', and 'Vacancy ID: 11'. The 'Process' column contains various icons for actions like 'view', 'View', 'contact', 'edit', 'process', 'rcmnd', 'appoints', 'note', 'e-mail', 'history', 'CV', 'add docs', 'Checklist', 'print', 'Int Notes', 'Referenc', and 'Edit App'. The 'Select' column has a checkbox checked, which is highlighted with a red box.

4. Click on the **Export all scores, recs, etc** link.

The screenshot shows the application interface with a top navigation bar containing links: 'Home', 'Search', 'My Settings', 'Vacancies', 'Approval Request', 'Interviews', 'Reports', and 'FAQs'. Below the navigation bar, there are several icons and links: 'Window tiling preferences', 'Print Settings', 'Bulk Print', 'Bulk Process', 'Bulk Email', 'Bulk References', and 'Export all scores, recs, etc'. The 'Export all scores, recs, etc' link is highlighted with a red box. Below this, there is a section titled 'Currently using Search Form. Click here to Change' with links 'Select All' and 'Select None'. The main content area shows the 'Search Candidates' interface with the same table as in the previous screenshot, but the checkbox in the 'Select' column is now unchecked.

5. The Candidate Export window will open. Click the purple '**Download**' button

The screenshot shows the 'Candidate Export' window. It has a title bar with a green icon and the text 'Candidate Export'. Inside the window, there is a section titled 'Choose format:' with two radio buttons: 'CSV' and 'Excel'. The 'Excel' radio button is selected. Below this, there is a section titled 'Choose a file name:' with a text input field containing 'Export' and a button labeled '.XLSX'. At the bottom of the window, there is a purple button labeled 'Download', which is highlighted with a red box.

Please note:

You can save the file in your H: Space or on a Shared Drive. Please ensure that the location is secure and shortlisting data is kept confidential.

- Open the file. It will show the **names** of the candidates who applied and the score fields will be blank.
- Enter your **recommendations** into **column D**, choosing one of the following options:
 - Invite to interview
 - Longlist
 - Regret after shortlisting
 - Reserve after shortlisting
 - Withdrawn Application
- Enter your first name and surname in the '**Reviewer**' column (**column G**).

[illegible]

9. Enter either a '1.00' or a '0.00' in each of the '**shortlisting criteria columns**'. On this example these are **columns I, J, K and L**, although on your spreadsheet there may be more if you have more criteria.
10. In the **Score Total (Shortlisting Criteria) Column H**, enter the total of the 1.00s and 0.00s. You can do this easily by using the formula functions on Excel.

[illegible]

Tip: Please ensure that you type your recommendation exactly in the format shown so that when the grid is uploaded to the system afterwards, it uploads correctly.

11. Save the file, ensuring that the location is secure and confidential.

Uploading Shortlisting Scores from an Excel Grid to Engage ATS

1. Log-in to Engage ATS and find the vacancy you would like to upload the shortlisting scores to. In this example we will use the '**Administrator**' vacancy shown below

Number of Applications by Vacancy		
Vacancy Live Status: <input checked="" type="radio"/> All	Vacancy Status: All	Vacancy Title: <input type="text"/>
Vacancy Name	Live status	Status
<input checked="" type="checkbox"/> HR Analyst	Not Live	Published
<input checked="" type="checkbox"/> Administrator	Live	Shortlisting
Administrator	Not Live	Published
Administrator	Not Live	Published
<input checked="" type="checkbox"/> Manager 2	Not Live	Published
Associate Manager	Not Live	Published
<input checked="" type="checkbox"/> Manager	Not Live	Filled
Associate Professor in Economics	Not Live	Published
<div> <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="Next"/> </div> Page size: 10		

Candidates per Application Stage	
Vacancy Live Status: <input checked="" type="radio"/> All	<input type="button" value="Search"/>
Active Stages	New Overall

Search and Filter

Channel

Job Type

2. Expand the vacancy and click on the '**new application submitted/shortlisting**' link to view the list of candidates who have applied for the vacancy. In this example, there is one candidate.

Number of Applications by Vacancy		
Vacancy Live Status: <input checked="" type="radio"/> All	Vacancy Status: All	Vacancy Title: <input type="text"/>
Vacancy Name	Live status	Status
<input checked="" type="checkbox"/> HR Analyst	Not Live	Published
<input checked="" type="checkbox"/> Administrator	Live	Shortlisting
<div> <div>Stages</div> <div> <div>Application submitted</div> <div>New submitted application/shortlisting</div> </div> </div>		
Administrator	Not Live	Published
Administrator	Not Live	Published
<input checked="" type="checkbox"/> Manager 2	Not Live	Published
Associate Manager	Not Live	Published
<input checked="" type="checkbox"/> Manager	Not Live	Filled
Associate Professor in Economics	Not Live	Published
<div> <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="Next"/> </div> Page size: 10		

Candidates per Application Stage	
Vacancy Live Status: <input checked="" type="radio"/> All	<input type="button" value="Search"/>

Search and Filter

Channel

3. Select the candidates you would like to include in the upload by ticking the box next to their name.

Recommendations for vacancy Administrator at application stage New submitted application/shortlisting

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

TOTAL / SHOW ALL CANDIDATES 1

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

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

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

Candidate	Recommendation	Print	Refs/Docs	Print Status	Select All
John Smith Panel Member1 - yet to review Con Venor1 - yet to review Panel Member2 - yet to review	Print Refs			<input checked="" type="checkbox"/>	

[Print](#)
[Refs/Docs](#)
[Print Status](#)
[Select All](#)

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

4. Click on the 'Upload scores, recm, etc' link

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


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

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

[Print](#)
[Refs/Docs](#)
[Print Status](#)
[Select All](#)

5. The 'Import manual scores and recommendations' window will appear. Click on 'Choose File' to browse your PC and find the file that you would like to upload.

Click the purple 'update' button to complete the upload.

 *Import manual scores and recommendations*

Files you upload here should have a first row of column headings, immediately followed by
If you wish to update "Manual Scoring" scores then the new values should be in columns v
section (tab) and Item is the label of the item within that section.

Please upload a
csv or xlsx file.

Choose File

No file chosen

Send email

☐

Update

File Name

Candidates

Downloading shortlisting scores from Engage ATS into an Excel file

1. Log-in to Engage ATS and find the vacancy you would like to export the scores for. In this example we will use the '**Administrator**' vacancy shown below.

Number of Applications by Vacancy

Vacancy Live Status: Vacancy Status: Vacancy Title: Vacancy ID:

Vacancy Name	Live status	Status	Closing date	New
<input type="checkbox"/> HR Analyst	Not Live	Published	07/01/2016	0
<input checked="" type="checkbox"/> Administrator	Live	Shortlisting	14/01/2016	0
Administrator	Not Live	Published	Ongoing	0
Administrator	Not Live	Published	Ongoing	0
<input checked="" type="checkbox"/> Manager 2	Not Live	Published	23/12/2015	0
Associate Manager	Not Live	Published	21/12/2015	0
<input checked="" type="checkbox"/> Manager	Not Live	Filled	21/12/2015	0
Associate Professor in Economics	Not Live	Published	21/12/2015	0

Page size: 10 8 items

Candidates per Application Stage

Vacancy Live Status:

Active Stages	New	Overall
Application submitted	0	2
Registration	0	2
Registered not submitted	0	2
New submitted application/shortlisting	0	2
Invite to interview	0	1
Ready for ResourceLink	0	1
Total	0	10

Search and Filter Applications

Channel:

Job Type:

Area:

Sub-Area:

Salary:

Vacancy Type:

Contract Type:

2. Expand the vacancy and click on the '**new application submitted/shortlisting**' link to view the list of candidates who have applied for the vacancy. In this example, there is one candidate.

Number of Applications by Vacancy

Vacancy Live Status: Vacancy Status: Vacancy Title:

Vacancy Name	Live status	Status
<input checked="" type="checkbox"/> HR Analyst	Not Live	Published
<input checked="" type="checkbox"/> Administrator	Live	Shortlisting

Stages

Application submitted

New submitted application/shortlisting

Administrator	Not Live	Published
Administrator	Not Live	Published
<input checked="" type="checkbox"/> Manager 2	Not Live	Published
Associate Manager	Not Live	Published
<input checked="" type="checkbox"/> Manager	Not Live	Filled
Associate Professor in Economics	Not Live	Published

Page size: 10

Candidates per Application Stage

Vacancy Live Status:




















Search and F

Channel

3. Select the names of the candidates that you would like to include in the export by checking the **box** next to their name.

Search Candidates








Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Candidate	Details	Process	Select
John Smith  	Vacancy Name: Administrator Application Stage: New submitted application/shortlisting Registered on: 06/01/2016 Vacancy ID: 11	 view  View  contact  edit  process  rcmnd  appoints  note  e-mail  history  CV  add docs  Checklist  print  Int  Referenc  Edit App	<input type="checkbox"/>

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

4. Click on the **Export all scores, recs, etc** link.




















Home Search My Settings Vacancies Approval Request Interviews Reports FAQs

 Window tiling preferences  Print Settings  Bulk Print  Bulk Process  Bulk Email  Bulk References  **Export all scores, recs, etc**

Currently using Search Form. [Click here to Change](#) [Select All](#) [Select None](#)

Search Candidates

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Candidate	Details	Process	Select
John Smith  	Vacancy Name: Administrator Application Stage: New submitted application/shortlisting Registered on: 06/01/2016 Vacancy ID: 11	 view  View  contact  edit  process  rcmnd  appoints  note  e-mail  history  CV  add docs  Checklist  print  Int  Referenc  Edit App	<input checked="" type="checkbox"/>

- The **Candidate Export** window will open. Click the purple **'Download'** button

Candidate Export

Choose format:

☐ CSV ☒ Excel

Choose a file name:

Export .XLSX

Download

Please note:

You can save the file in your PC. Please ensure that the location you choose is secure and confidential.

- You will then be able to open the file and see the data that the panel have entered.

File Home Insert Page Layout Formulas Data Review View Add-Ins										
Clipboard Font Alignment Number Styles Cells										
CandidateID										
	A	B	C	D	E	F	G	H	I	J
1	<u>Vacancy: Administrator</u>									
2	Panel Members: Panel Member1, Panel Member2									
3										
4										
5	<u>CandidateID</u>	<u>Forename</u>	<u>Surname</u>	<u>Recommendation</u>	<u>Notes</u>	<u>Saved/Submitted</u>	<u>Reviewer</u>	<u>Score Total (Shortlisting Criteria)</u>	<u>Shortlisting Criteria.Knowledge and experience</u>	<u>Shortlisting Criteria.Communication</u>
6	3482091	John	Smith				Con Venor1			
7							Panel Member2			
8				Invite to interview		Saved	Panel Member1	2.00	1.00	1.00
9										
10										
11										
12										
13										

