

Engage ATS (Applicant Tracking System): Vacancy Initiation (Recruiting Managers)



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Originator:	HR Operational Support				

Who is this for?	Recruiting Managers
What is it about?	Submitting recruitment schedules and further particulars, using the Engage ATS online vacancy application system.
Which process come before?	Separate, Finance-owned process to seek financial Authority to Appoint (ATA). ATA Guidance is available online.
Which process come after?	Engage ATS Reviewing Applications and Shortlisting/ Interviewing (Conveners and Panel Members)
Acronyms used:	ATS (Applicant Tracking System); ATA ([financial] Authority to Appoint); FPs (Further Particulars); HR (Human Resources); SOP (Standard Operating Procedure)
Useful link(s):	Pegasus ; Engage ATS system ; ATA Guidance ; Further Particulars templates

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1. Complete preparatory tasks, outwith the e-recruitment system

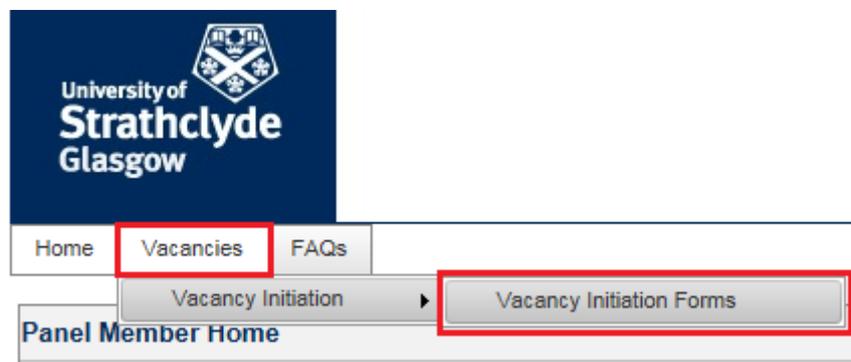
- Ensure (typically) that the financial authority to appoint has been raised via the Finance-owned ATA process. [ATA Guidance](#) is available online.
- Prepare the Further Particulars document, which will require to be uploaded as a part of the process that follows. [Further Particulars templates](#) are available via HR's 'Recruiting at Strathclyde' webpages.
- Consider who will be filling the roles associated with the recruitment process:
 - The **recruiting manager** – this will be the *individual* owner of the process detailed on the following pages, who will initiate the vacancy creation process. This individual may, subsequently, also be the convener of the panel – but it could equally be someone (such as a departmental administrator) acting on the convener's behalf. Only one person can 'own' the vacancy initiation workflow so the process is best completed in one sitting (with the details and Further Particulars having been agreed previously).
 - The **convener** of the shortlisting and interview panels – this will typically be the most senior member of the panel, who will have the 'final say' on shortlisting/ interview scoring and recommendations and will submit these via the Engage ATS system (details are provided in a separate document). For cases in which HR are represented on the panel, the HR member may act as an 'administrative convener' who will collate scores and upload them to Engage ATS on the 'actual' convener's behalf. The convener (actual or administrative) should be identified during the process steps that follow, as this will be the only person who will be able to input or upload definitive scores and recommendations, when that time comes.
 - The **panel members** – these individuals should be named during the process steps that follow, so that HR can set them up to record interview scores (at a later stage).

2. Log in to Engage ATS online recruitment system

- Log in to the Engage ATS online recruitment system via the link under the **Human Resources tab** within [Pegasus](#), using your normal DS account username and password.  If you are unable to log in please e-mail the HR Operational Support Team (operationalsupporthr@strath.ac.uk) who will arrange for access to be granted.
- Arrive at the Recruiting Manager home page. An overview of this page is given in [Appendix A](#).

3. Raise a vacancy initiation request

- Select Vacancies > Vacancy Initiation > Vacancy Initiation Forms



- Note the list of vacancies initiated previously, under this login (the list will of course be blank the first time it is accessed). Vacancies are listed in reverse chronological order, with the most recent on top. Where applicable, note the icons indicating the status of each vacancy initiation request:

-  Continue editing/ submit an incomplete Vacancy Initiation form (only available until submission to HR)
-  View the progression history of the request
-  View the Vacancy Initiation form
-  Print the Vacancy Initiation form (this first generates a pdf, which is viewable on-screen)
-  Delete the Vacancy Initiation form (only available up to the point at which the process has been completed)

- Click 'Add' next to 'Vacancy Approval Workflows'.  The 'approval' terminology is a legacy from the off-the-shelf system package and has nothing to do with the [financial] Authority to Appoint (ATA) process.
- Select 'Vacancy Approval workflow' from the 'Initiation Process' dropdown (the only option available).  The screen will refresh and new form fields will appear, for contact email addresses.
- Enter the Vacancy Name (i.e. Job Title).  You may wish to copy this to your clipboard, as it can be re-used shortly. (Click within the field, then press <CTRL><A> then <CTRL><C> to 'select all' and 'copy' respectively.)
- Start typing your work email address into the first 'Search email address here:' field. After entering enough of this to narrow-down the search, select your own email address (there may be a short delay).
- Check that your full email address is now displaying in the right-hand field.
- Start typing the email address of the HR team appropriate to your area (enter 'hr-' in order to narrow-down the list).
- Select the HR team email address and check that this has pulled across to the right-hand field.

To create a Vacancy Initiation Form:

1. Select the Initiation Process
2. Enter a Vacancy Name
3. Click click 'Start Workflow' to generate your Vacancy Initiation Form

After selecting an Initiation Process, you will be asked to enter in your email address and an HR email address. Please select from the list below for the HR email address:

hr-engineering@strath.ac.uk
hr-hass-sbs@strath.ac.uk
hr-professional-services@strath.ac.uk
hr-science@strath.ac.uk

Initiation Process	Vacancy Approval workflow						
Vacancy Name	Lecturer B (NAOME)						
Your email address	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-bottom: 1px solid #ccc; padding: 2px;">Search email address here:</td> <td style="width: 50%; border-bottom: 1px solid #ccc; padding: 2px;">Once selected the email address will appear here:</td> </tr> <tr> <td style="border-bottom: 1px solid #ccc; padding: 2px;"> </td> <td style="border-bottom: 1px solid #ccc; padding: 2px;">convenor4@strath.ac.uk</td> </tr> </table>	Search email address here:	Once selected the email address will appear here:		convenor4@strath.ac.uk		
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HR email address	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-bottom: 1px solid #ccc; padding: 2px;">Search email address here:</td> <td style="width: 50%; border-bottom: 1px solid #ccc; padding: 2px;">Once selected the email address will appear here:</td> </tr> <tr> <td style="border-bottom: 1px solid #ccc; padding: 2px;">hr-</td> <td style="border-bottom: 1px solid #ccc; padding: 2px;">hr-engineering@strath.ac.uk</td> </tr> <tr> <td colspan="2" style="border: 1px solid #ccc; padding: 2px;"> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> <p>HR Engineering <hr-engineering@strath.ac.uk></p> <p>HR HASS SBS <hr-hass-sbs@strath.ac.uk></p> <p>HR Professional Services <hr-professional-services@strath.ac.uk></p> <p>HR Science <hr-science@strath.ac.uk></p> </div> </td> </tr> </table>	Search email address here:	Once selected the email address will appear here:	hr-	hr-engineering@strath.ac.uk	<div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> <p>HR Engineering <hr-engineering@strath.ac.uk></p> <p>HR HASS SBS <hr-hass-sbs@strath.ac.uk></p> <p>HR Professional Services <hr-professional-services@strath.ac.uk></p> <p>HR Science <hr-science@strath.ac.uk></p> </div>	
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- Press "Start Workflow". A 'Vacancy Approval' form will appear.  This can be saved at any time by selecting "Save and Exit" at the bottom on the form and can be returned to prior to submission by following the undernoted path from the recruiter home page then pressing the 'continue workflow' button  against the appropriate 'workflow': **Vacancies > Vacancy Initiation > Vacancy Initiation Forms**
- Note that the online form replaces the previous Recruitment Schedule document to gather preferred recruitment advertising and timescale information.  Please note: the information submitted should be considered provisional and HR will not normally be authorised to progress to advertising before full Financial Authority to Appoint has been granted. Timescales are subject to agreement with HR and minor changes may be necessary to accommodate panel availability and meeting requirements for Home Office compliance, etc.
- Start populating the form, noting in particular the mandatory fields (marked with an asterisk *).

- Enter the post title (or paste it <CTRL><V>, if you copied it to the clipboard in an earlier step).
- Reach Section C and enter the names of the convener and panel members (this is necessary so that HR can assign appropriate roles to these staff, for shortlisting/interview scoring purposes).  Where named, an optional 'System Convener' will be granted the system privileges of an 'actual' convener, to perform **system-based** tasks on the 'actual' convener's behalf. Concurrently, the 'actual' convener will be granted access akin to that of a panel member.  The **system convener's** scores and recommendations will subsequently be definitive and will drive the process forwards. This option is appropriate where an HR representative or departmental administrator is to submit scores and recommendations on behalf of the convener and panel. If left blank, the 'Convener (decision-maker)' will be given this system role.

Convener (decision-maker) *

System Convener (optional)

Panel Members (including Job Titles) *

- Proceed to Section D and enter the interview and/or presentation date(s).
- Confirm that the interview date and room have been confirmed and that the panel have been notified. HR will use this information to proceed with interview invitations, at the appropriate stage in the process.
- Upload the previously-completed Further Particulars (FPs) document.  Please note that this should be in a Word format (.doc, .docx), with a name indicating the vacancy to which it relates. Take care to click the 'Upload' button, as it is easy to forget to do so.

Uploaded Documents

Document Name	Date	Delete
Further Particulars....	03/12/2014 15:18:31	

- Enter the text of the job advertisement, as it is to be published online.  This blurb will be available from the Further Particulars document. It makes sense to reside within the FPs because it involves a reasonable quantity of text, which will normally be prepared offline. However, additionally pasting the text directly into this system field will make the job description readily available to potential applicants.
- Note that HR will ensure that the correct Faculty, Department, Grade, Salary and other basic information taken from the financial ATA form is included in the advertising text.
- Enter Contact Details for informal enquiries. These will appear in the published job advert.
- Click 'Submit' to send the information to HR for review.  Any missing, mandatory information will be indicated by red text.
- Receive email confirmation that the Vacancy Initiation request has been successfully submitted. HR will review the information and will contact you to discuss any required amendments. For efficiency, minor amendments to Recruitment Schedules and FPs will be dealt with outwith the formal workflow (for example via email or telephone communications).

4. Review the progress of your vacancy initiation request

- Review the progress of the Vacancy Initiation request at any time, via the Recruiting Managers' homepage then: **Vacancies > Vacancy Initiation > Vacancy Initiation Forms**
 - **'Active'** forms with a 'continue workflow' button  against them have been saved but have not yet been submitted to HR. **'Active'** forms *without* a 'continue workflow' button have been submitted to HR and cannot be changed. **'Completed'** forms have been reviewed and finalised by HR. Forms that have been submitted to – or finalised by – HR, may be viewed by clicking on the 'view form' icon. 
- Discuss any proposed amendments with HR (you will be notified of such proposals). Minor amendments to Recruitment Schedules and FPs will be dealt with outwith the formal workflow.  If you receive an e-mail confirming that HR has approved the vacancy 'subject to conditions', you must confirm (by logging in to the system) that you are happy with the conditions set. As indicated above, more minor changes will be agreed offline.

5. Follow-up on the vacancy initiation process

- Note that, once the financial authority to appoint (ATA) process is complete and all advertising documentation is in place, HR will use the information provided to set up and advertise your vacancy.  You will receive an e-mail confirming your post is live and open for applications.
- Note also that, once your post is live, you will be able to review applications as they come in. Please see the Reviewing and Shortlisting Applications procedure notes for more details.

<SOP ends. [Return to top](#)>

Appendix A: overview of recruiter home page

University of Strathclyde Glasgow

Logged in as [convenor4@strath.ac.uk](#) | [Logout](#)

Home **Vacancies** FAQs

Panel Member Home ^

Welcome to the University of Strathclyde online recruitment system.

Vacancy Name	Live status	Closing date	New	Overall
Training Vacancy 1	Live	10/12/2014	0	0
Manager Training Vacancy 4	Not Live	26/11/2014	0	6

Stages

	New	Overall
Shortlisting	0	2
Schedule for Regret	0	1
1st Interview Confirmed	0	3

Page navigation controls: Page size:

Vacancy Approval Requests ^

Date of Request	Workflow Name	Link
18/09/2014 14:55	Administration Assistant	DW testing Approval Form

[Contact Us - Recruitment query](#)
[Contact Us - Technical query](#)
[Change Password](#) | [Accessibility](#)

Font size:
Contrast:
Font face:

Menu item that provides the options necessary to begin the recruitment process

Link to vacancy-specific document repository; this folder may contain files that have been uploaded by HR that are relevant to the vacancy.

Control to expand/collapse the view of the vacancy.

Links to candidate lists by stage in process. Yellow-highlighted stages are those requiring action.

Page navigation controls (first, previous, next and last pages).

Page size selector (number of items); this can be increased to 20 or 50 items.

Control to expand or collapse individual 'panels'

Hyperlinked number indicating overall count of applicants

Hyperlinked numbers indicating number of candidates at each stage. Links lead to lists of applicants by stage.

Link to 'Approval Form', otherwise known as the 'Vacancy Initiation' form. Please note that the link will only remain active for as long as you are able to edit the form. Once it has been submitted to HR, you will be advised that the vacancy has progressed beyond that stage.

Accessibility options for visually-impaired users, including larger font sizes, different foreground and background colours, and different font faces.