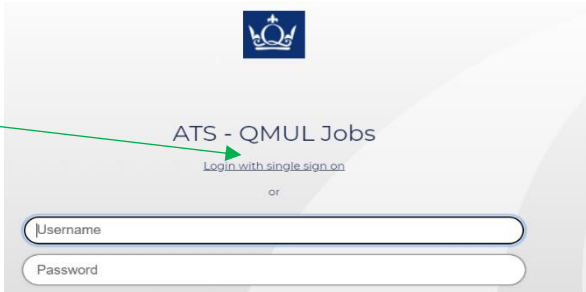
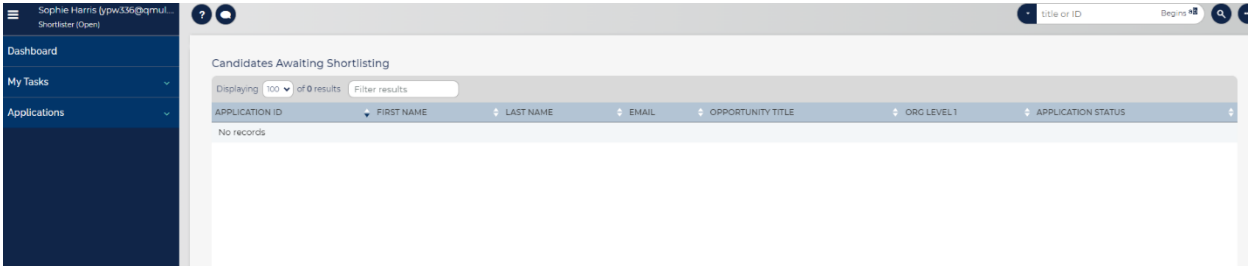


Oleeo User Guide – Shortlisting in System (Lead Shortlister)

This document will provide you with step-by-step guidance on how to:

- Complete shortlisting in system as a Lead Shortlister
- View total scores of all shortlisters
- Finalise shortlisting decisions

Throughout this document, the words opportunities and vacancies are used interchangeably. Please note each opportunity must follow one method of shortlisting (in system or offline). A hybrid approach must not be adopted.

Accessing Oleeo/Dashboard	
Step/Action	Example/Screenshot
<p>To access the Oleeo system, follow this link: https://qmul-jobs.tal.net/ and click “Log in with single sign on” to log in to the system. You are not required to enter any log in details.</p> <p>When you log into Oleeo, you will be presented with your homepage known as your Dashboard.</p> <p>Your dashboard will show you a list of applications that need to be reviewed and scored by you (shortlister).</p>	 

How To Shortlist (score) In System – Lead Shortlister

The name of the Lead Shortlister is indicated by the Hiring Manager at the point of submitting the vacancy request. The Lead Shortlister is individual who makes the final decision on whether the application form is rejected, shortlisted, or placed on reserve. They must make the final decision by taking into account all the shortlisters score/s and feedback.

Step/Action

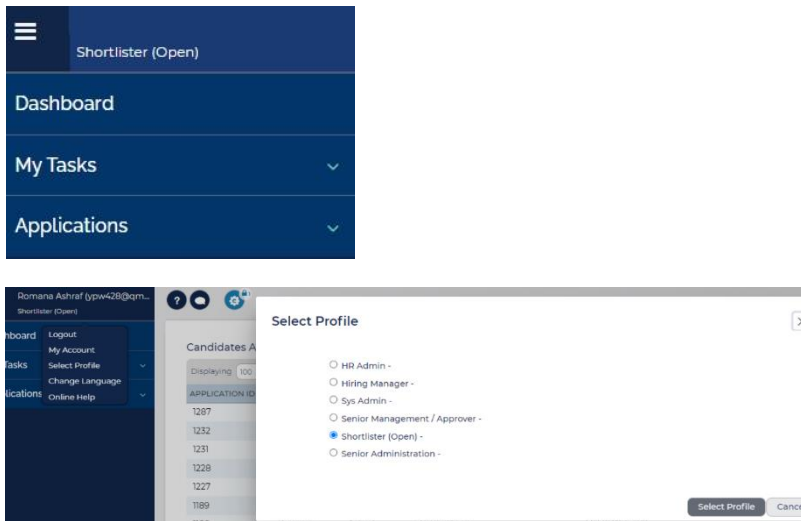
Step 1: To shortlist and score application forms within Oleeo as a Lead shortlister, you can use your **“Shortlister (Open)”** or **“Hiring Manager”** profile. Please note you must be listed as **“Lead Shortlister”** in the opportunity form to undertake this activity via the **“Shortlister (Open)”** profile.

You can view your logged-in profile by referring to the top left-hand side of your screen under your name.

If you need to change your profile, you can do this by clicking your name, **“Select Profile”**.

Step 2: Once you are logged in, you will see a list of application forms that require reviewing in the **“Shortlisting Forms to Complete”** box. Double click the application row you wish to score.

Examples



The screenshot shows the user profile menu on the left with options: Dashboard, My Tasks, and Applications. The 'Select Profile' dialog box is open, showing a list of profiles: HR Admin, Hiring Manager, Sys Admin, Senior Management / Approver, Shortlister (Open) (selected), and Senior Administration.

OPPORTUNITIES	SHORTLISTING	INTERVIEWS	CONDITIONAL OFFER	PRE-EMPLOYMENT CHECKS	UNCONDITIONAL OFFER / START DATE	EMPLOYMENT VARIATIONS						
Shortlisting Forms to Complete												
Displaying 25 of 5 results Whole Table Filter Filter results												
APPLICATION ID	FIRST NAME	LAST NAME	OPPORTUNITY TITLE	ORG LEVEL 1	ORG LEVEL 3	HIRING MANAGER	HRA	LEAD SHORTLISTER	SECOND SHORTLISTER	THIRD SHORTLISTER	REJOINER?	DAYS AWAITING SHORTLISTING
1553	Julian	Ace	Lead Shortlister - in system user guide	Professional Services	Recruitment & Operations	Romana Ashraf	Kathleen Di Giorgio	Romana Ashraf	Asma Husain	Romana Ashraf		0
1552	Rose	H	Lead Shortlister - in system user guide	Professional Services	Recruitment & Operations	Romana Ashraf	Kathleen Di Giorgio	Romana Ashraf	Asma Husain	Romana Ashraf		0

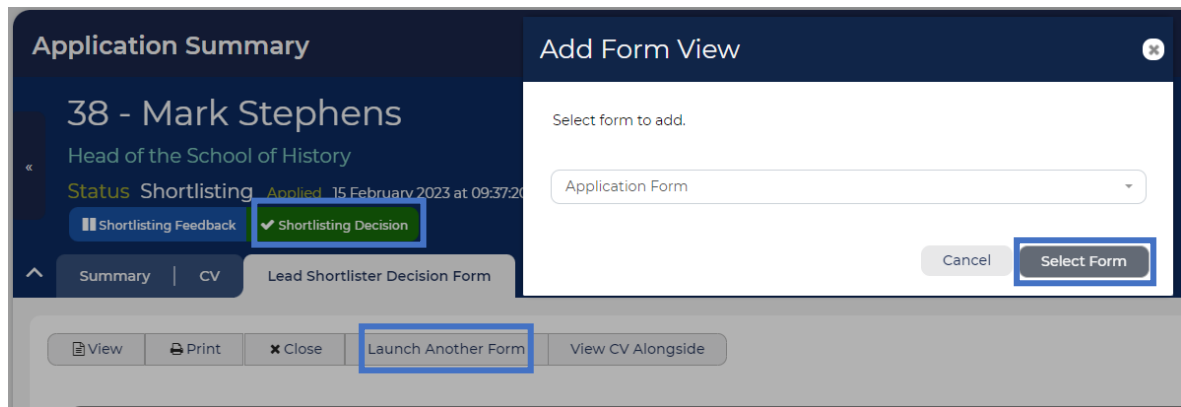
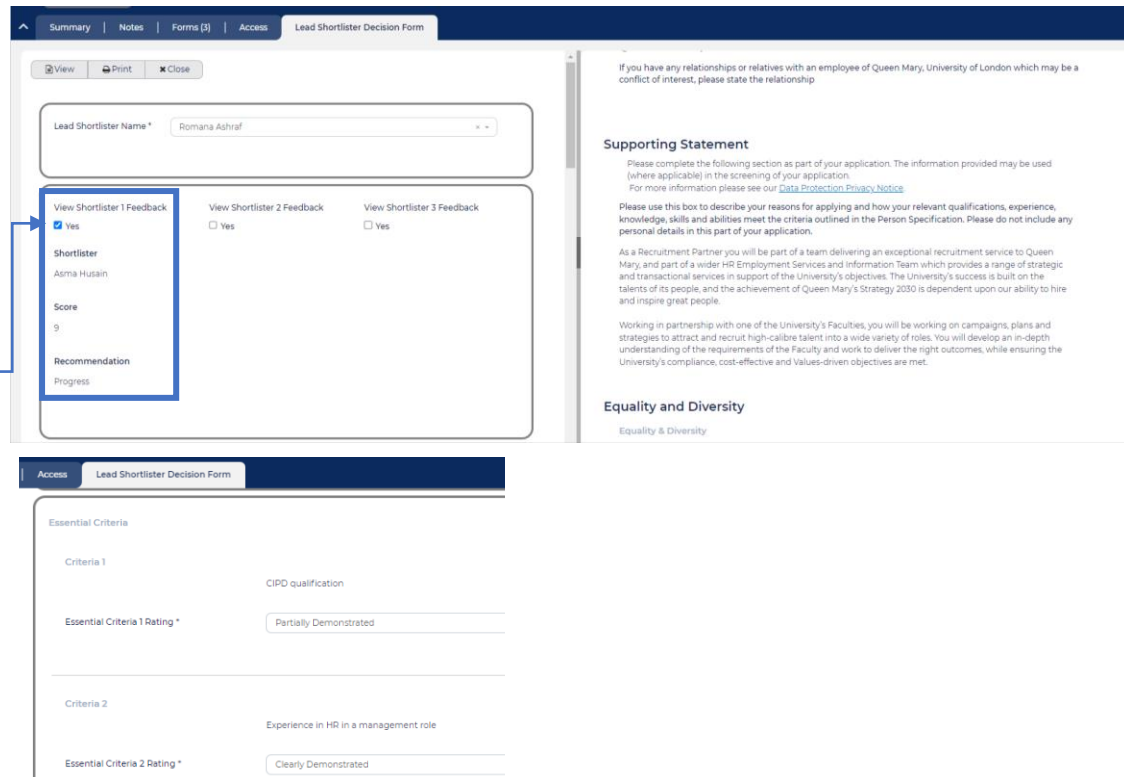
Step 3: Then select the “**Shortlisting Decision**” button, which will launch the “**Lead Shortlister Decision Form**”. The shortlisting decision form will allow you to score against the shortlisting criteria the Hiring Manager provided when raising the vacancy request (shortlisting criteria must reflect the Person Specification for this position). In addition, it will also allow you to view the other shortlister’s scores, recommendations, and allow you to make a final decision for the application.

Step 4: Next, you must click “**Launch Another Form**” and select “**Application Form**” and click “**Select Form**”.

This will allow you to view the Application Form next to the Shortlisting Decision Form.

You can view the other shortlister/s feedback by selecting the “**yes**” check box.

Step 5: Complete the “**Lead Shortlister Decision Form**” by scoring the Application Form. For each shortlisting criteria, you must provide a rating based on the Application Form (and CV where appropriate).

Towards the end of the form, you will see your total score for the application and be required to complete a summary/decision section.

For “Ready to make a final outcome decision?” question select:

- **Yes**, if all other shortlisters have fully completed their shortlisting/scoring for this application, and you want to record an outcome for the application form. Once submitted, the form will be saved and the application status will change accordingly.
- **No**, if some or all other shortlisters have not completed the shortlisting for this application, and therefore, you *do not* want to make a final decision. You will be able to come back to the form and update it once all shortlisters have completed their scoring.

Automated Emails:

- Rejected – Where you have indicated “rejected” as the final decision, the candidate will automatically be sent a rejection email (this can be viewed on the candidate summary page).
- Progress to Interview– Where you have indicated “Progress to Interview” as the final decision, the candidate *will not* be sent an automated email. You are required to send the interview invites.

Score
Score 7

Summary / Decision
Ready to make a final outcome decision? * Yes

Shortlisting Decision * Progress to Interview

Please note that the applicant will only be informed of this outcome once you have set up the interviews and sent the invites.

Please add in your final summary comments for the applicant.

Summary Comments * Really good candidate with relevant experience and skills in HR management

If this is the last candidate being reviewed, remember to click the 'Shortlisting Complete' button on the opportunity.

Submit

Summary / Decision
Ready to make a final outcome decision? * No

Please use the summary comments section to add your comments about the application.

Summary Comments * Really good candidate with relevant experience and skills in HR management

Submit

- Reserve – where you have indicated the candidate is to be placed on a “reserve” list as the final decision, the candidate will receive an automated reserve email. The email can be viewed on the candidate summary page.

Step 6: To begin shortlisting the next application, click the arrow seen here and follow the same steps.

Alternatively, you can go back to your dashboard and double click into the application you wish to score next.

You can also view the total scores and summary information from all shortlisters by taking the following steps:

1. Search for the vacancy/Opportunity
2. Click the “Applications” tab
3. Click “View All”
4. Select the “Shortlisting Summary (in portal)” layout

This layout will allow you to see the total scores, recommendations, and comments from all shortlisters.

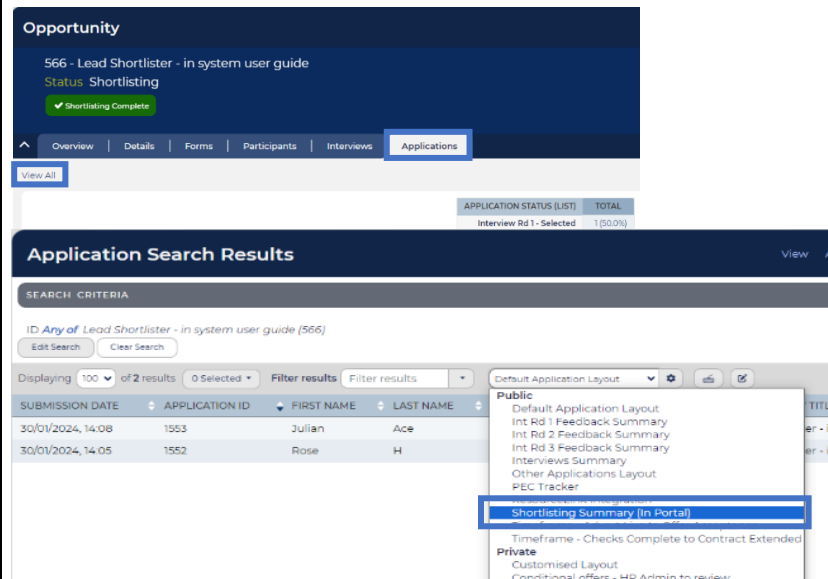


Application Summary ← Print Package

600 - Victor Montgomery

Head of the School of History

Status: Shortlisting Applied 15 February 2023 at 09:43:39 GMT



Opportunity

566 - Lead Shortlister - in system user guide

Status: Shortlisting

Shortlisting Complete

Overview | Details | Forms | Participants | Interviews | Applications

View All

APPLICATION STATUS (LIST) TOTAL

Interview Rd 1 - Selected 1 (50.0%)

Application Search Results View Add

SEARCH CRITERIA

ID: Any of Lead Shortlister - in system user guide (566)

Edit Search Clear Search

Displaying 100 of 2 results 0 Selected Filter results Filter results Default Application Layout

SUBMISSION DATE	APPLICATION ID	FIRST NAME	LAST NAME	TITLE
30/01/2024, 14:08	1553	Julian	Ace	er - in s
30/01/2024, 14:05	1552	Rose	H	er - in s

Public

- Default Application Layout
- Int Rd 1 Feedback Summary
- Int Rd 2 Feedback Summary
- Int Rd 3 Feedback Summary
- Interviews Summary
- Other Applications Layout
- PEC Tracker
- Shortlisting Summary (In Portal)**
- Timeframe - Checks Complete to Contract Extended

Private

- Customised Layout
- Conditional offers - HR Admin to review

Step 7: Once you have completed all your shortlisting decision forms for all

Application Forms, you must update the opportunity status to **“Shortlisting Complete”** by selecting the green button on the opportunity page.

Next, you will need to set up the interviews. Please use the interview set user guides for further assistance.

Opportunity

566 - Lead Shortlister - in system user guide

Status Shortlisting

✔ Shortlisting Complete