
iTrent Recruitment Shortlisting Manager's Guide



**Employee
Service Centre**

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Version Control

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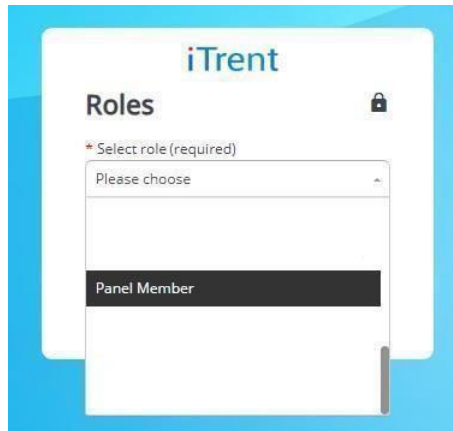
Please note that when you click on the links within iTrent, iTrent will prompt you on the left-hand pane to search for the Requisition or Applicant depending on what part of the process you are working on. You must enter this information even if you are accessing via the Recruitment Summary – otherwise, the page will not populate. If you click on a link and the iTrent screen does not generate, please ensure you have searched on the left-hand pane.

Shortlisting

When the advert for the requisition has closed, you can then complete **shortlisting**. To do so, we **recommend** the **Recruiting Manager** meets with the other **Panel Members** as soon as possible after the advert closes to shortlist the applicants and arrange the interviews. This meeting can be done either in person or virtually. However, if this is not possible and, particularly when there is a high volume of applications, the Recruiting Manager can complete this action as they have overall responsibility for the process.

Accessing Your Requisition


When accessing iTrent to commence shortlisting, use the **Panel Member** role:



If this role does not display as an option for you, please contact the Workforce Resourcing Team via myNL Portal to request Panel Member access. The request must include, the Requisition Name, Requisition Reference number (REQ), your name and employee reference number.

Downloading Applications

When the advert has closed, all applicants will appear under the stage **Web Applicant** at the **Manage Applicants** area. Applicants will be anonymous and can be identified by their applicant reference number (**APP*******).

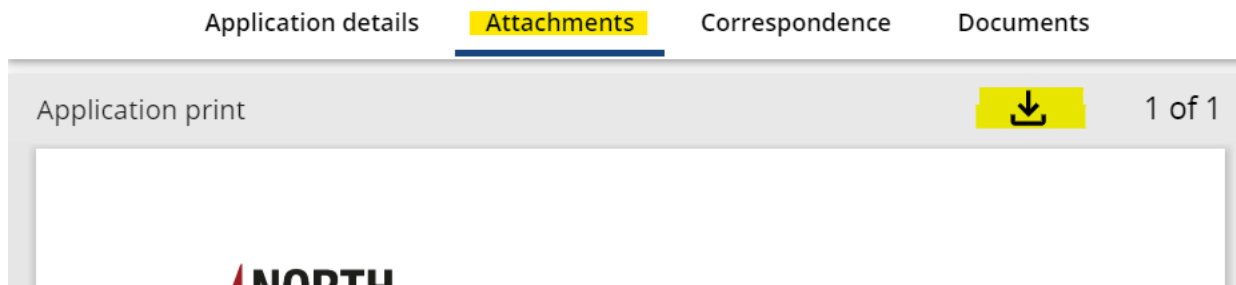
If the applicant reference number is not totally visible, you can find this by hovering over the  icon (often a flag will obscure the full number on the dashboard).

To view an application, you should click on each applicant by clicking “Anonymous” -




Applicant	Requisition name	Requisition reference	Current stage	Applicant reference	Location
Anonymous	APPLICATION TESTING - DO NOT APPLY	REQ01520	Web applicant	APP00007152	
Anonymous	APPLICATION TESTING - DO NOT APPLY	REQ01520	Web applicant	APP00003723	

Then click on “Attachments” and click the download icon. This will download the application for you to shortlist.



Application details **Attachments** Correspondence Documents

Application print  1 of 1

NODTL

Applicants Displaying a Flag

Applicants who confirm themselves as any of the following can be identified by a flag next to their name.

- We are a [Disability Confident Leader](#) and offer a **guaranteed interview** to applicants who consider themselves to be disabled and who **meet the essential criteria** for the job. *Reasonable adjustments to support equal opportunity to perform at an interview must be made also.*
- We also have the guaranteed interview scheme for **supported employment**

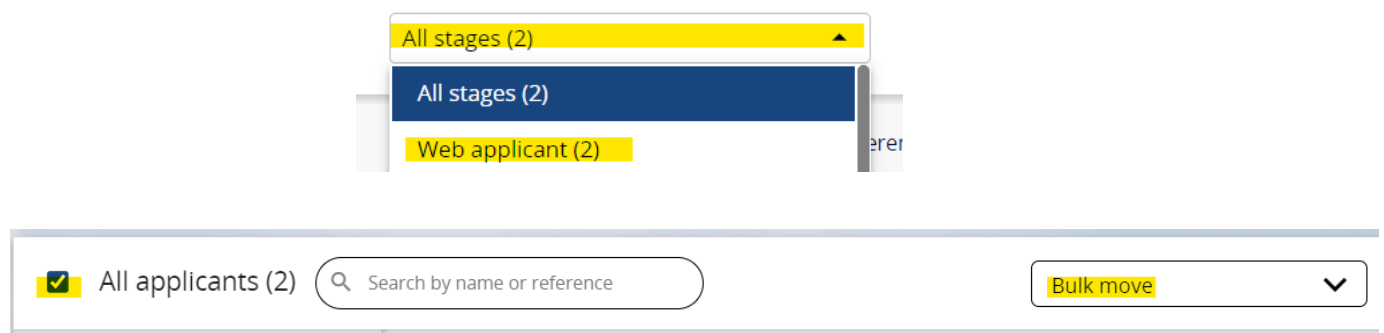
applicants, like applications from **Employment Initiative, Family Firm, Project Ability, Routes to Work, Pathway Programme – Winter Leaver.**

- The guaranteed interview scheme also includes **veterans, reservists, service leavers and service leavers' spouses.** Find out about the Armed Forces Covenant [here](#). *For more information on the issues faced by ex-service personnel, there is an e-learning course on [Learn NL](#).*
- North Lanarkshire Council is committed to #KeepingThePromise. This means that **if you have ever been in care** (looked after at home with a social worker, lived with a relative other than your parents, experienced foster, residential or secure care) you are entitled to a **guaranteed interview** for this position if you **meet the essential criteria of the person specification/job description.** This is one way North Lanarkshire is demonstrating our commitment to supporting Care- Experienced People.

These applicants must be guaranteed an invite to interview if they meet all of the essential criteria, so please ensure you take a note of their application reference number when completing your shortlisting.

Progressing to Shortlisting

To progress to shortlisting, at the **All Applicants** dashboard, select **All Stages** from the drop down and then select **Web Applicant**. You will then be able to tick the check box at the left-hand side of **All applicants**. Then select the drop down again which will have changed name to **Bulk move** and then select the **Shortlisting** stage. You should then select **Move stage** on the final page. This will then allow you to commence shortlisting:



Move applicants to new stage (as of 14/11/2024)
✕

Applicant

Stage

Stage notes

Attach people resource

Resource person	Mailing job title	Start date	End date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+ -

Applicants

Applicant name	Applicant stage
Anonymous (APP00003723)	Web applicant
Anonymous (APP00007152)	Web applicant

Move stage

Once all applicants are sitting under the **Shortlisting** stage, the shortlisting form can be accessed at the link **Shortlist Applicants** (*you will then need to enter the REQ name or number in the left-hand pane for the shortlisting proforma to display*):

LINKS

> Request to recruit

> Web Applicant

▼ Shortlisting

> Interviews

> Offer

> Onboarding

> Recruitment details

> Recruitment Correspondence

> References

> Applicant profile

☰ ☰

1. Shortlist applicants

2. Run shortlisting report

3. Download shortlisting report

4. Move to reject/next stage

View applicant shortlisting

View Job Description & Employee Specification

These links will be available on the **Panel Member** role.

Known Applicants

Applicants at the shortlisting stage will be anonymised and are not identifiable.

Shortlisting Applicants

When completing the online shortlisting proforma, each applicant will be scored against the criteria set out under the employee specification. The Panel must ensure all applicants are shortlisted. You can access the Job Description & Employee Specification at the below link, which sits under **Shortlisting**:



Please note that only one person is required to complete the online shortlisting forms on behalf of the Panel.

Non-Teaching Requisitions

Each applicant should be scored against the criteria detailed with each respective section of the employee specification using the scoring matrix below:

Qualifications/Training, Work Experience, Knowledge/Skill/Ability, Personal Qualities/Attributes, Other

Essential criteria	Criteria information	Shortlisting question	Shortlisting response	Criteria score	Comments
Qualifications & Training (essential) Factor Assessed as per Employee Spec (e.g. Qualifications & Training)				_____	
Work Experience (essential) Factor Assessed as per Employee Spec (e.g. Work Experience)				_____	
Knowledge/Skill/Ability (essential) Factor Assessed as per Employee Spec (e.g. Knowledge/Skill/Ability)				_____	
Personal Qualities/Attributes (essential) Factor Assessed as per Employee Spec (e.g. Personal Qualities/Attributes)				_____	
Other (essential) Factor Assessed as per Employee Spec (e.g. Other)				_____	

Please refer to the employee specification for the position when completing your applicant shortlisting. The shortlisting will be carried out in **two parts** with the **essential and desirable criteria scored separately**. When assessing an application against the employee specification, these sections will be scored on a scale of **0 to 4**, as outlined

below.

- 0 – No evidence provided/not applicable**
- 1 – Applicant mentions some of the criteria**
- 2 – Applicant mentions all criteria**
- 3 – Applicant mentions some of the criteria and provides relevant supporting examples**
- 4 – Applicant mentions all criteria and provides relevant supporting examples**

For the Qualifications & Training factors, you should score the applicants as follows:

- **If there is only one qualification on the employee specification, they should be scored either 0 if they do not have this or 4 if they have this.**
- **If there are two qualifications on the employee specification, they should be scored 0 if they do not have either, 2 if they have one of the qualifications or 4 if they have both.**

While there may be more than 2 qualifications in this section, please ensure these are scored at the relevant sections for those that are Essential and those that are Desirable (if applicable).

There is a **Comments** field available for each criteria section and this should only be used for any additional/supporting information relating to the scoring. Please be mindful that any information included in these fields **will be made available** to an applicant in the event of a **subject access request**.

Once you have completed the shortlisting form, please ensure you select **Save** at the bottom of the page before moving on. Repeat for all applicants under the requisition.

The Panel then decide which applicants make the interview shortlist.

Teaching Requisitions

For teaching requisitions, the criteria and scoring system reflect the previous shortlisting proforma and should be completed in the same manner. Applicants should be scored as either a **0 or 1** for each of the listed criteria, with a comments box for supporting information:

Criteria Information	Shortlisting question	Shortlisting response	Criteria score	Comments
Present Post/ School Present Post/ School			<input type="checkbox"/>	
Qualifications Qualifications			<input type="checkbox"/>	
Experience Experience			<input type="checkbox"/>	
Professional Development Professional Development			<input type="checkbox"/>	
Working with and leading people Working with and leading people			<input type="checkbox"/>	
Management Skills Management Skills			<input type="checkbox"/>	
Communication Skills Communication Skills			<input type="checkbox"/>	
Implementing Change Implementing Change			<input type="checkbox"/>	
Inter Personal Skills Inter Personal Skills			<input type="checkbox"/>	

The comments field is for any additional/supporting information relating to the scoring. Please be mindful information included in these fields **will be made available** to an applicant in the event of a **subject access request**.

Shortlisting in Bulk

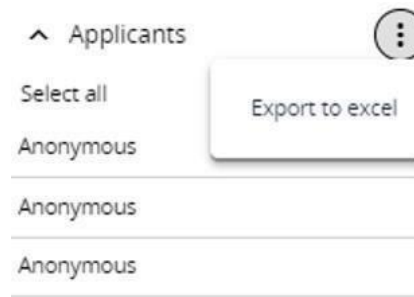
For requisitions with a high volume of applicants, you can shortlist in bulk using a **spreadsheet proforma** and upload this to iTrent as a **document attachment**. To do this,

1. Move applicants from **Web Applicant** stage to **Shortlisting**.
2. **Download the shortlisting proforma** by clicking on the link under the **Shortlisting** tab:

[Download Shortlisting Proforma - "NLC - Shortlisting Proforma v1"](#)

3. **Copy & Paste APP (Application) numbers** from iTrent to the Shortlisting Proforma - this can be achieved by the following steps: Click on **Shortlist Applicants**

Click the 3 dots and press **Export to Excel**:






4. You can then copy the APP numbers from the Excel downloaded document to the Shortlisting pro-forma.
5. Once you have shortlisted, you should then upload the proforma to iTrent:

Upload Shortlisting Proforma

You should then follow the below guidance for moving applicants to the next stages/rejection.


Progressing Completed Shortlisting

When shortlisting has been completed for all applicants, the member of the Panel responsible for progressing to interviews will progress through the remaining **Shortlisting** links, beginning with **Run Shortlisting Report**. Selecting this link will then refresh the page and the left panel will display options available for **Recruitment Reports**. Select **Applicant Shortlisting** and the **effective date must be the current date**. You will see the following page and complete as below:

Applicant shortlisting (as of 10/02/2023) ^ LESS   

1. Shortlist applicants 2. Run shortlisting report 3. Download shortlisting report

4. Move to reject/next stage View applicant shortlisting

Requisition name 

Requisition stage

Highlight candidates with highest total score

Print blank scoring matrix

Include cover pages

Output type

Report run comments

At **Requisition name**, select the magnifying glass and then search/select your requisition. At **Requisition stage**, select the stage **Shortlisting**. Ensure the checkbox is selected for **Highlight candidates with highest total score**.

After this, select **Run** and you will receive an iTrent notification and an email once the report is ready. When this is ready, return to the menu at the top and then progress to the link **Download Shortlisting Report**. Download a copy of the report which will identify the highest scoring applicants. This will allow you to identify which applicants will be progressed to interview.

Applicant Shortlisting

Requisition: iTrent Recruitment Test
 Stage(s): Shortlisting
 Highlight candidates with highest total score: Yes

Stage: Shortlisting

Requisition name: iTrent Recruitment Test
 Response range: 0 - 4
 Total number of applicants: 10

Applicant Name (Applicant Reference)	Essential					Desirable					Total
	Knowledge/Skill/ Ability (essential)	Other (essential)	Personal Qualities/Attrib utes (essent ial)	Qualifications & Training (essential)	Work Experience (essential)	Knowledge/Skill/ Ability (desirable)	Other (desirable)	Personal Qualities/Attrib utes (desir able)	Qualifications & Training (desirable)	Work Experience (desirable)	
ANON. (APP000000002)	4	4	4	4	4	4	4	4	4	4	40
ANON. (APP000000090)	0	0	0	0	0	1	1	1	1	1	5
ANON. (APP000000091)	3	3	3	3	3	3	3	3	3	3	30
ANON. (APP000000092)	3	3	3	3	3	4	4	4	4	4	35
ANON. (APP000000093)	2	2	2	2	2	3	3	3	3	3	25
ANON. (APP000000094)	2	2	2	2	2	2	2	2	2	2	20
ANON. (APP000000095)	1	1	1	1	1	1	1	1	1	1	10
ANON. (APP000000096)	1	1	1	1	1	0	0	0	0	0	5
ANON. (APP000000098)	4	4	4	4	4	3	3	3	3	3	35
ANON. (APP000000100)	0	0	0	0	0	0	0	0	0	0	0

10/02/2023
08:39:50

*** denotes highest scoring applicant(s)

Page 2 of 10

In the above example, we have used the highlighter tool on Adobe Acrobat Reader to note the highest scoring applicants to be progressed to interview. You will require to either highlight or take a note of these applicant's reference numbers for the following steps to progress them correctly.

You must use **the essential scores first** and then refer to desirables if required.

Your applicants for interview will be those **who scored highest on the essential criteria**. If there are a significant number, you can narrow the pool for interview by selecting those who scored highest on the desirable criteria. *For example, both APP000000093 & APP000000094 scored 2 for all essential criteria on the above, however APP000000093 is being progressed to interview as they scored higher on the desirable criteria.*

Rejecting Unsuccessful Applicants

Once you have noted and selected the unsuccessful applicant reference numbers, you will move the applicant stages similar to the first part of this guidance note, except you will select **Shortlisting at Stage** selection. Once you have selected the relevant applicants by clicking the check box next to their applicant reference number, you must ensure **Rejected** after shortlisting is selected at **Move to**. When rejecting applicants, you must select the checkbox **for Run document merge** to ensure they receive an email advising them of their outcome, you must then select **Save**.

Update information

Stage selection: **Shortlisting**

Move to: **Rejected after shortlisting**

Stage notes:

Run document merge

Generate emails

Applicants


Applicant name	Applicant stage	
Anonymous (APP00000002)	Shortlisting	<input type="checkbox"/>
Anonymous (APP00000096)	Shortlisting	<input checked="" type="checkbox"/>
Anonymous (APP00000095)	Shortlisting	<input checked="" type="checkbox"/>
Anonymous (APP00000093)	Shortlisting	<input type="checkbox"/>
Anonymous (APP00000090)	Shortlisting	<input checked="" type="checkbox"/>
Anonymous (APP00000098)	Shortlisting	<input type="checkbox"/>
Anonymous (APP00000100)	Shortlisting	<input checked="" type="checkbox"/>
Anonymous (APP00000091)	Shortlisting	<input type="checkbox"/>
Anonymous (APP00000092)	Shortlisting	<input type="checkbox"/>
Anonymous (APP00000094)	Shortlisting	<input checked="" type="checkbox"/>

Progressing Applicants to First Interview

When the pages refresh, return to the **Move to** field. Update to **First Interview** and then select the remaining applicants and click **Save**; doing so will move the remaining applicants to the stage **First Interview**.

Update information

Stage selection • Shortlisting ▼

Move to • First interview ▼ 

Stage notes

You have now completed your shortlisting and can progress to interviews.

How To Check Rejection Email has been Generated

To check that the rejection email has been generated, go to the stage **Reject After Shortlisting**, select the applicant name **Anonymous** under the applicant reference number (similar to how you located the applicants application form), you will then have displayed the **Applicant summary**

From this screen you will see the list of **Correspondence**, including details of the date and time this was generated:

Application details	Attachments	Correspondence	Documents
Correspondence details			
REC - Rejected after shortlisting			
Document	REC - Rejected after shortlisting		
Generated date	11/01/2024		
Generate time	14:31		

If you cannot see this correspondence listed, move the affected applicant(s) back to the **Shortlisting** stage and then follow the instructions at [Rejecting Unsuccessful Applicants](#) again.

Please note that generated correspondence runs on a daily batch and will not send to the rejected applicants instantly.

No Suitable Applicants

If the Panel determines there are **no suitable applicants** after completing their shortlisting, contact the **Workforce Resourcing team** via the myNL Portal to confirm whether you wish to re-advertise and a member of the team will progress this accordingly.

If you would like to re-advertise, confirm the following details in your email:

- Requisition name
- Requisition reference number
- Whether the requisition should be re-advertised internally or externally
- How long this should be re-advertised for

