

How to manage users in NHS Jobs user guide

This guide gives you instructions for how to manage users in the NHS Jobs service.

You'll need to add users to your organisation's account to complete the necessary recruitment tasks.

To add a user, you'll need to add their:

- Email address
- First name
- Last name
- Job title

Once you've added their details, you'll need to select an NHS Jobs role.

The roles available are:

- 'Super user'
- 'Team manager'
- 'Recruitment administrator'
- 'Recruiting manager'

To manage users, you can:

- Add a user
- Change a user's details
- · Deactivate a user
- Reactivate a user

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Only a 'Super user' can manage users and their accounts.

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View what the roles can do

This table shows what the roles can do and is accessed from the 'Select their NHS Jobs role' page.

Description	Super	Team manager	Recruitment administrator	Recruiting manager
Create a job listing	√	√	√	√
Approve a job listing	✓	√	√	√
Publish a job listing	✓	√	✓	
Change a published listing	√	√	√	
Close a listing early	√	√	✓	
Score applications	√	√	√	√
Choose a shortlist	√	√	√	√
Create offers and contracts	✓	√	√	
View offers and contracts	√	√	✓	✓
Manage pre- employment checks	√	✓	√	
View pre- employment checks	✓	✓	✓	√
View all listings	√	√	✓	
Manage team workload	√	√		
Run reports	✓	✓		
Add and change user details	√			
Change KPIs	√			

Recruitment tasks

This table shows a description of each task and what it means.

Description	What it means	
Creating a job listing	You can create and publish a job listing.	
Approve a job listing	You can approve or reject a job listing.	
Publish a job listing	You can publish a job listing for jobseekers to apply.	
Change a published listing	You can change and republish a job listing for jobseekers to apply.	
Close a listing early	You can close a job listing before the closing date.	
Score applications	You can view applications and score applications.	
Choose a shortlist	You can choose applicants to select for interview.	
Create offers and contracts	You can create job offers or issue contracts and send them to successful applicants.	
View offers and contracts	You can view (read only) a job offer or contract sent to successful applicants.	
Manage pre-employment checks	You can add, edit, or delete pre-employment check information for successful applicants.	
View pre-employment checks	You can view (read only) pre-employment check information for successful applicants.	
View all listings	You can view all job listings on an organisation's account.	
Manage team workload	You can view job listings by users who are assigned as the recruitment administrator for the job. You can also assign and reassign job listings to manage user's workloads and ensure the recruitment progresses.	
Add and change user details	You can add, change, deactivate and reactivate a user on an organisation's account.	
Change KPIs	You can change the default KPIs (99 working days) on an organisation's account.	

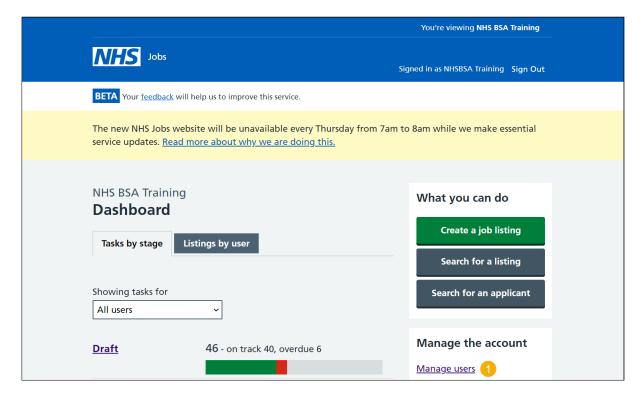
Manage users

This page gives you instructions for how to manage users.

Important: Only a 'Super user' can manage users and their accounts.

To view your organisation's users, complete the following step:

1. Select the 'Manage users' link.

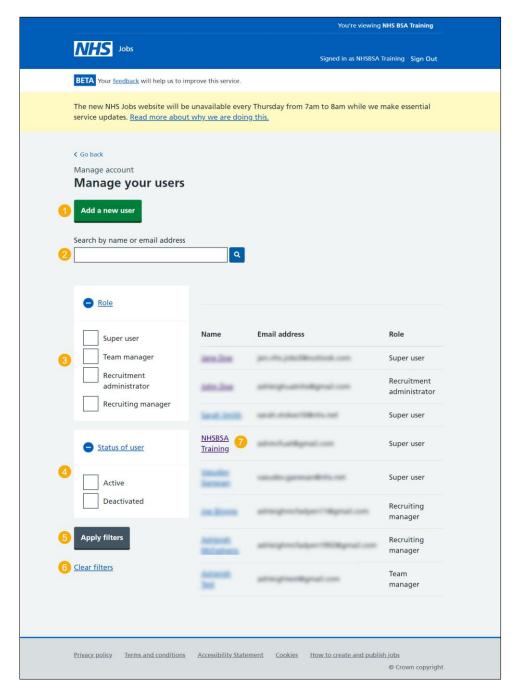


Manage your users

This page gives you instructions for how to manage the users on your organisation's account.

To add a new user or make changes to an existing user, complete the following steps:

- 1. Select the 'Add a new user' button.
- 2. Search for a user, using their name or email address (optional).
- 3. Filter users by their 'Role' type (optional).
- **4.** Filter users by their 'Status' type (optional).
- 5. Select the 'Apply filters' button (optional).
- 6. Select the 'Clear filters' link (optional).
- 7. Select the 'User name' link.



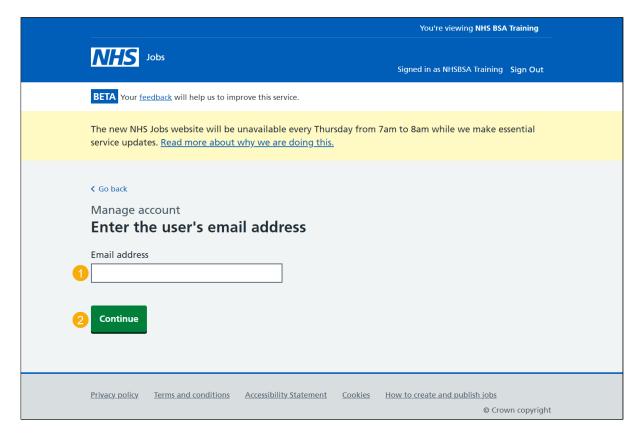
Enter the user's email address

This page gives you instructions for how to enter the user's email address.

Important: This page will only show if you're adding a new user.

To enter the email address, complete the following steps:

- 1. In the **Email address** box, enter the details.
- 2. Select the 'Continue' button.

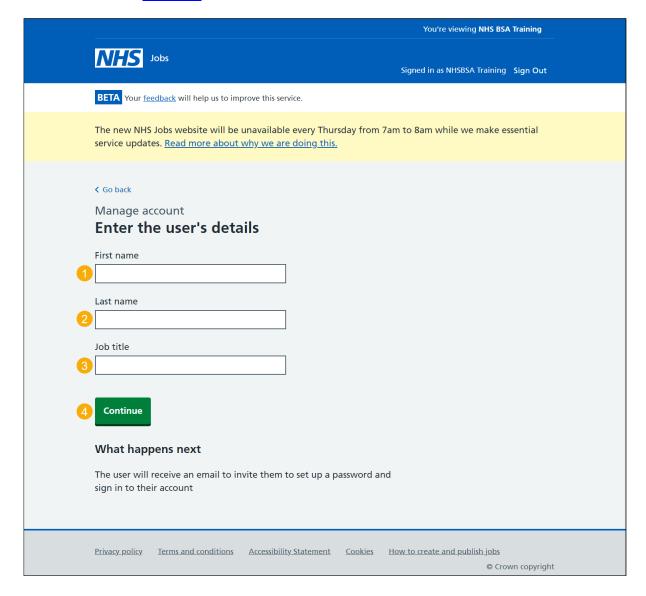


Enter the user's details

This page gives you instructions for how to enter the user's details.

To enter the user's details, complete the following steps:

- 1. In the First name box, enter the details.
- 2. In the Last name box, enter the details.
- 3. In the Job title box, enter the details.
- **4.** Select the 'Continue' button.



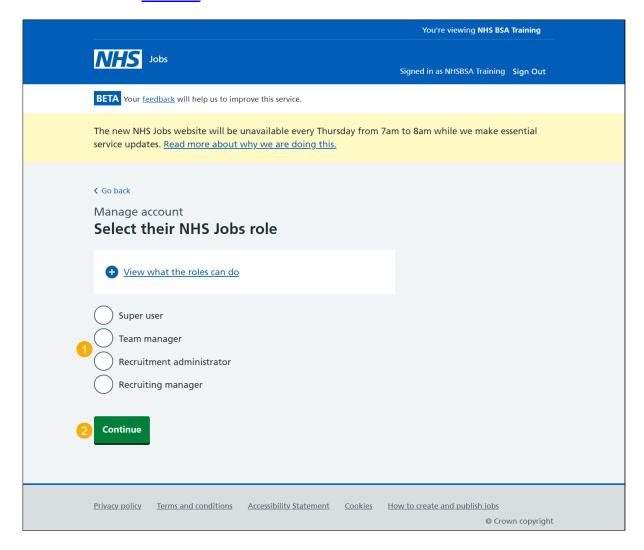
Select their NHS Jobs role

This page gives you instructions for how to select their NHS Jobs role.

Important: You can '<u>View what the roles can do</u>' page and the '<u>Recruitment tasks</u>' page before you select their role.

To select their NHS Jobs role, complete the following steps:

- 1. Select an answer.
- 2. Select the 'Continue' button.



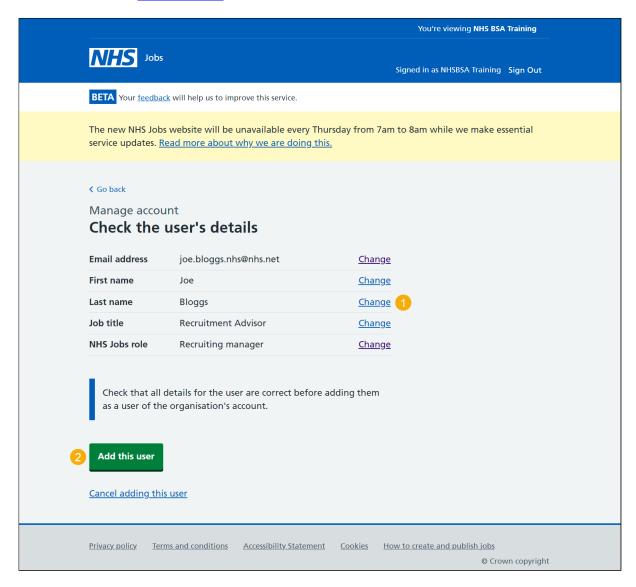
Check the user's details

This page gives you instructions for how to check the user's details.

Important: Check the details are correct before adding them as a user on the organisation's account. Once you've added them, they'll receive an email to invite them to set up a password and sign into their account.

To change or add this user, complete the following steps:

- 1. Select a 'Change' link (optional).
- 2. Select the 'Add this user' button.



Tip: You can select the 'Cancel adding this user' link if you don't want to add this user.

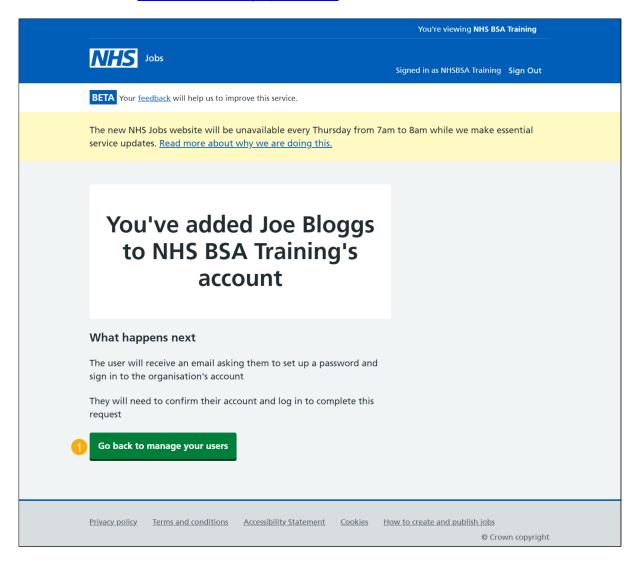
You've added the user to your account

This page shows confirmation you've added the user to your account.

Important: The user will receive an email asking them to set up a password and sign into the organisation's account. They will need to confirm their account and log in to complete this request.

To manage your users, complete the following step:

1. Select the 'Go back to manage your users' button.



You've reached the end of this user guide as you've added a user to your organisation's account.

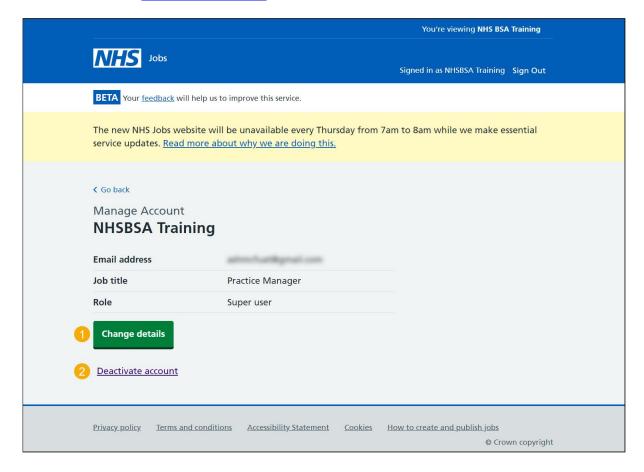
Change or deactivate a user's account

This page gives you instructions for how to change or deactivate a user's account

Important: If you need to change your details, contact the NHS Jobs administrators.

To change or deactivate a user's account, complete the following step:

- 1. Select the 'Change details' button.
- 2. Select the 'Deactivate account' link.



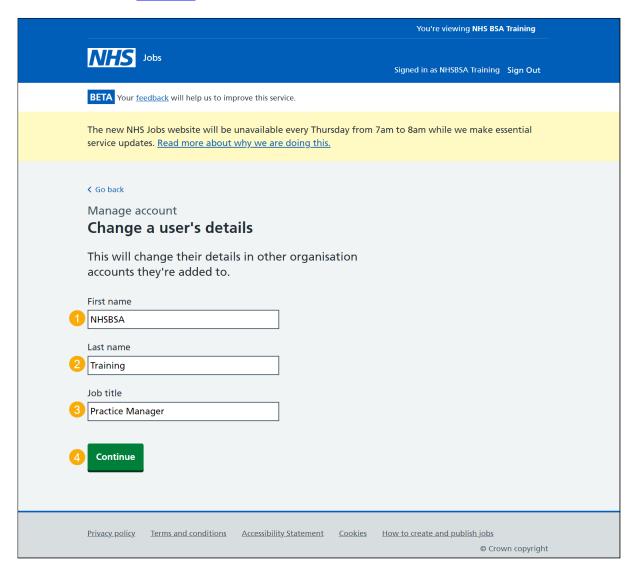
Change a user's account details

This page gives you instructions for how to change a user's account details.

Important: This page is only shown if you're changing a user's account details.

To change a user's account details, complete the following step:

- 1. In the **First name** box, enter the details.
- 2. In the Last name box, enter the details.
- 3. In the **Job title** box, enter the details.
- **4.** Select the 'Continue' button.

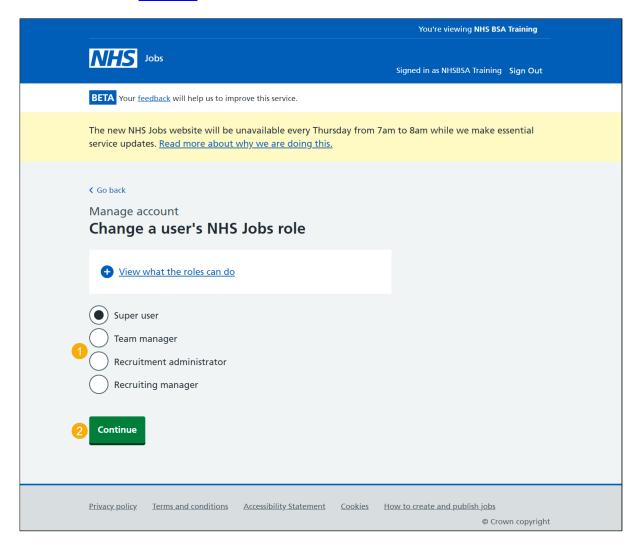


Change a user's NHS Jobs role

This page gives you instructions for how to change a user's NHS Jobs role.

To change a user's NHS Jobs role, complete the following steps:

- 1. Select an answer.
- 2. Select the 'Continue' button.



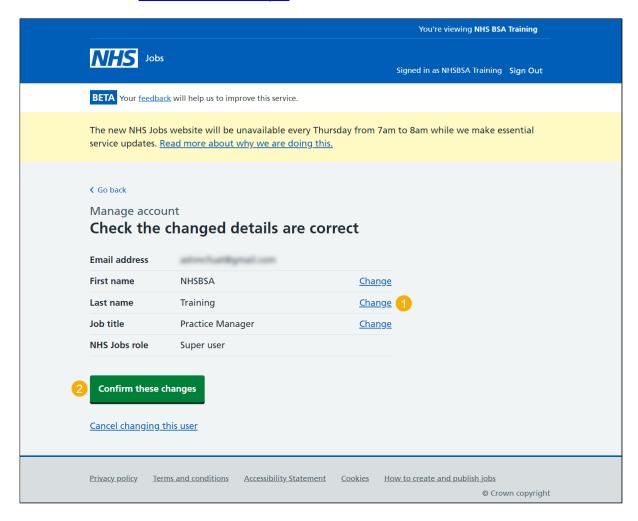
Tip: Select the 'View what the roles can do' link for more information.

Check the changed details are correct

This page gives you instructions for how to check the changed details are correct.

To change or confirm these changes, complete the following steps:

- 1. Select a 'Change' link (optional).
- 2. Select the 'Confirm these changes' button.



You've reached the end of this user guide as you've changed a user's account details.

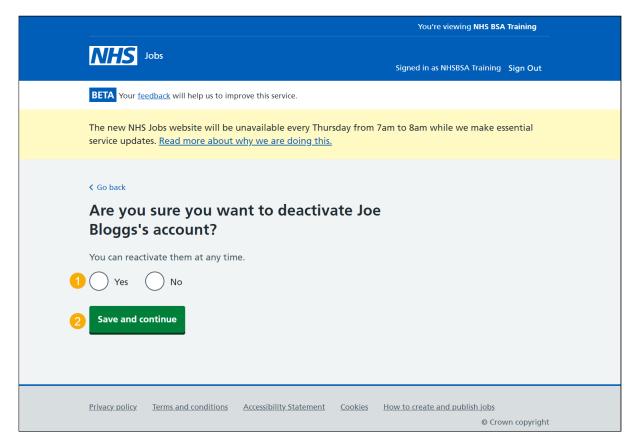
Are you sure you want to deactivate the user's account?

This page gives you instructions for how to confirm you're sure you want to deactivate the user's account.

Important: This page is only shown if you're deactivating a user's account.

To confirm you're sure you want to deactivate the user's account, complete the following steps:

- 1. Select an answer:
 - 'Yes'
 - 'No'
- 2. Select the 'Save and continue' button.



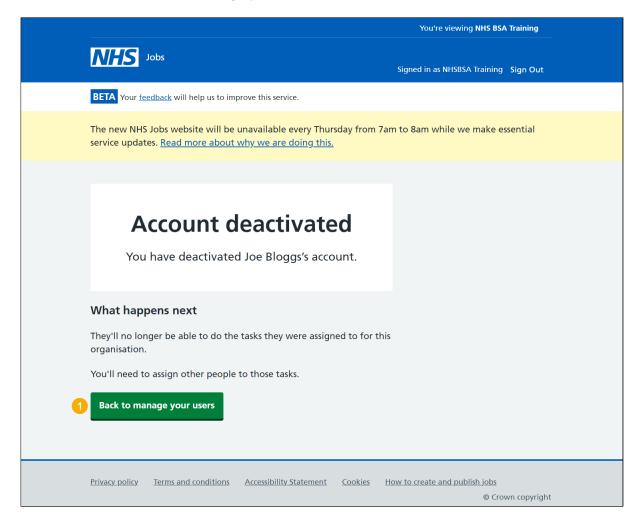
Tip: You can reactivate a user's account at any time.

Account deactivated

This page shows confirmation the user's account is deactivated.

Important: Once a user is deactivated, they'll no longer be able to do the tasks they were assigned to for this organisation. You'll need to assign other people to those tasks.

1. Select the 'Back to manage your users' button.



You've reached the end of this user guide as you've deactivated a user's account.

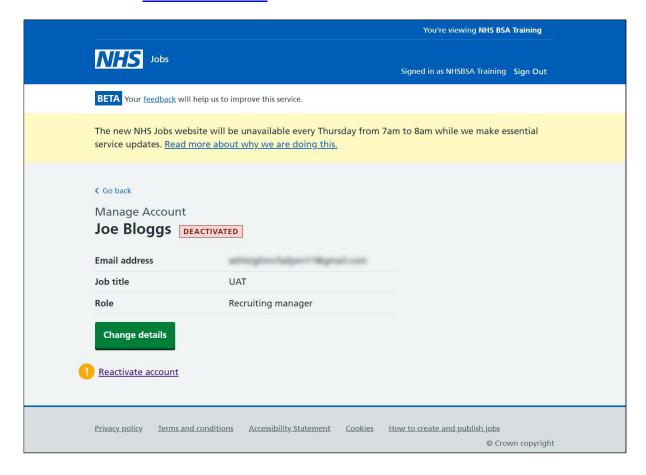
Reactivate account

This page gives you instructions for how to reactivate a user's account.

Important: This page is only shown if you're reactivating a user's account. If a user is deactivated, the status 'DEACTIVATED' is shown. If you need to change your details, contact the NHS Jobs administrators.

To reactivate a user's account, complete the following steps:

1. Select the 'Reactivate account' link.

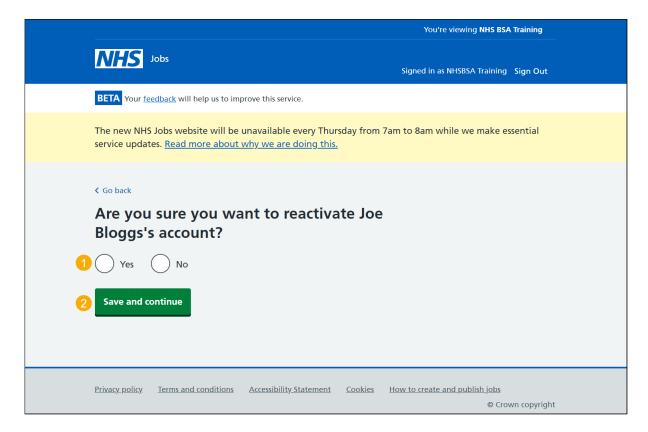


Are you sure you want to reactivate the user's account?

This page gives you instructions for how to confirm you're sure you want to reactivate the user's account.

To confirm you're sure you want to reactivate the user's account, complete the following steps:

- 1. Select an answer:
 - 'Yes'
 - 'No'
- 2. Select the 'Save and continue' button.

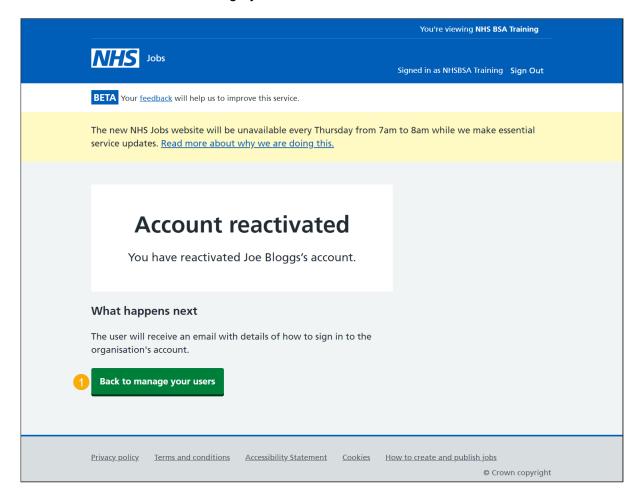


Account reactivated

This page shows confirmation the user's account is reactivated.

Important: The user will receive an email with details of how to sign into the organisation's account.

1. Select the 'Back to manage your users' button.



You've reached the end of this user guide as you've reactivated a user's account.