People and Money system

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Hiring Guide- How to request a new position or position change

Hiring Manager / Line Manager / School/Dept. Admin / Business Support Team

Estimated time to complete: 12 minutes

Assumed Knowledge

Hiring Managers access Hiring via My Team from the Home page. School/Department Administrators and Business Support access Hiring via My Client Groups from the Home page.

If a position is created for which the requisition is subsequently rejected, the new position needs to be made inactive by resubmitting a request for a position change with the reason to ‘change position hiring status’.

All line managers and administrators will be able to view all positions which exist within the system including details of the incumbents (current staff) in each position.

The Job Requisition Business Case form should be attached to New Position and Position Change requests.

We are not currently using the ‘requisition’ functionality so this option should not be selected until this functionality is released.

The position change function can only be used to make changes to the criteria listed in the appendix. To make any other changes, such as changing the position name, please raise a service request to HR Systems.

Changes made as a result of position change requests will affect all current incumbents of that position.

In Brief...

Search Positions

1. From the Home page, select My Client Groups, Show More then select Position Details from the workforce structures section
2. Enter the **Position Name** into the search field then click the search icon
3. Select the **show filters** link to view further search options
4. Filter the results to also show **Inactive** positions and the relevant **Department**.
5. Click the position name to view more information held on that position

**Request a New Position**

This is a simple overview of the process.

1. From the **Home** page:
   - click on **My Team** if you are a Hiring Manager or Line Manager, or
   - click on **My Client Groups** if you are Business Support or School/Department Administration.
2. Click **Show More** under **Quick Actions** and select **Request a New Position**
3. Select the **Budget Details** checkbox and click **Continue**.
4. Complete the 4 sections:
   - When and Why
   - Position Details
   - Budget Details
   - Comments & Attachments, attaching the Job Requisition Business Case form
5. Click **Submit**.

For detailed guidance, see the [next section](#).

**Request a Position Change**

1. From the **Home** page:
   - click on **My Team** if you are a Hiring Manager or Line Manager, or
   - click on **My Client Groups** if you are Business Support or School/Department Administration
2. Click **Show More** under **Quick Actions** and select **Request a Position Change**.

3. Search for the Position for which requires the request for change.

4. Select the **Budget Details** checkbox and click **Continue**.

5. Complete the 4 sections:
   - When and Why
   - Position Details
   - Budget Details
   - Comments & Attachments attaching the Job Requisition Business Case form

6. Click **Submit**.

For detailed guidance, see the [next section](#).

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**In Detail…**

**Search Positions**

1. From the **Home** page, select **My Client Groups, Show More** then select **Position Details** from the workforce structures section.

![Image of Workforce Structures with Position Details highlighted](image-url)
2. Enter the **Position Name** into the search field then click the search icon

![Image of search interface]

It’s best to use generic job names where possible and search for ‘administrator’ rather than ‘senior administrator’ or ‘Administration manager’ to ensure you are presented with all options.

3. Select the **show filters** link to view further search options

![Image of show filters link]
4. Filter the results to also show **Inactive** positions and the relevant **Department**

5. If no positions are returned, you will need to request a new position

6. Click the position name of any results to view more information held on that position.

For details of the naming convention for positions see **Appendix 3**.
a) Check that those names listed as current incumbents of the position are in an equivalent role to the type of position you wish to recruit/appoint to.

If Yes, continue, if no, select a different position from your search results or Request a New Position.

b) Check that the grades held against the position contain the one you wish to recruit/appoint to.

If Yes, continue, if no, select a different position from your search results or Request a New Position.
c) Check the Vacant FTE on the post is enough to cover your recruitment activity

If Yes, continue with your recruitment activity, noting the position number to recruit to. If no, see the steps below.

7. If there is insufficient FTE to recruit/appoint your new hire, use the Action button to Request a Position Change

Then continue from Step 5 of the Request a Position Change instructions.
1. From the Home page:
   - click on My Team if you are a Hiring Manager or Line Manager, or
   - click on My Client Groups if you are Business Support or School/Department Administration

2. In Quick Actions, click the Show More link (you may need to scroll).


4. Select the Budget Details checkbox and click Continue.

![Request a New Position](image)

5. In the form that opens, there are 4 sections to complete before it can be submitted:
   - When and Why
   - Position Details
   - Budget Details
   - Comments & Attachments

6. Enter or update section 1 When and Why ensuring the mandatory fields are not blank and click Continue.
   a. If required, click on the calendar icon to change the date of When does the new position start.
   b. Select the What’s the reason for this request? (See Appendix 1 for an explanation of the Request a New Position reasons.)
7. Enter or update section **Position Details**, ensuring that the fields are populated accordingly and click **Continue**:

a. **Parent Position** - This will populate but must be cleared

b. **Business Unit** – select relevant Business Unit, e.g. University of Edinburgh

c. **Name** – this must be the same name as the Job you select, we suggest selecting job first, copying this and then pasting into the Name field

d. **Department** – select relevant department
e. **Job** – select relevant job by typing in the name, e.g. ‘Admin’ and the relevant options will appear in the dropdown list

f. **Location** – do **not** select a location (this is set on the assignment, not the position)

g. **Grade** – these will pull in automatically from the selected Job but this can be amended and new grades added

h. **Standard Working Hours** – this will automatically default to 35 Weekly but can be amended if required

i. **Working Hours** – this will default to 35 Weekly but both values must be removed so the fields are blank

j. **Probation Period** – select the number and frequency

k. **Overlap Allowed** – this must always be set to **Yes**

8. Enter or update section **3 Budget Details** ensuring the mandatory fields are not blank and click **Continue**.

9. In section **4 Comments and Attachments**:
   - **Cost Center** is blank
   - **FTE** is set to the FTE required for the position being recruited to
   - **Type** is set to ‘Shared’
a. Enter supporting information in the **Comments** box.

b. In the **Attachments** section, to upload supporting documents, click on the down arrow next to **Drag files here or click to add attachment**, and select **Add File**. Navigate to the location where the document is stored, select it and the document name appears in the **Attachments** section.

This is where the Job Requisition Business Case should be attached.

10. Before the form is submitted, you can review a section by clicking on the **Edit** button in the section heading to make any required modifications.

11. Finally, click the **Submit** button in the black banner to forward the request for approval and the **Home** page reopens.

**Request a Position Change**

1. From the **Home** page:
   - click on **My Team** if you are a Hiring Manager or Line Manager, or
   - click on **My Client Groups** if you are Business Support or School/Department Administration.

2. In **Quick Actions**, click the **Show More** link (you may need to scroll).

3. From **Workforce Structures** select **Request a Position Change**.
4. Click into the **Search** field, enter the **Position** and click the search icon. (Warning: If you click on the search icon without entering any characters, an error message is displayed. Click OK to dismiss the message.)

![Search field](image)

**Note**: To perform a more specific search, click on the **Show Filters** link and choose the applicable options (see **Search Positions**).

5. Click on the **Position** in the list of results.
6. Select the **Budget Details** checkbox and click **Continue**.

7. In the form that opens, there are 4 sections to complete before it can be submitted:

   - When and Why
   - Position Details
   - Budget Details
   - Comments & Attachments

8. Enter or update section 1 **When and Why** ensuring the mandatory fields are not blank and click **Continue**.

   a. If required, click on the calendar icon to change the date of **When does the position change start**.
b. Select the **What's the reason for this request?** (See Appendix 2 for an explanation of the Request a Position Change reasons.)

9. Enter or update section 2 **Position Details** ensuring that the fields are populated accordingly and click **Continue**:  
  
a. **Status** – this should be kept as active unless there are no current or future incumbents of the position  
b. **Department** – this should not be changed  
c. **Job** – this should not be changed  
d. **Grade** – update the grade(s) or add another grade as required if this a grade change (within the grade range provided in the [naming convention](#))  
e. **Entry Grade** – this should be the lowest grade within the grade range for the position or the lowest grade of the current incumbents if this is not the lowest grade in the boundary  
f. **Standard Working Hours** – this should not be changed unless required  
g. **Working Hours** – this fields must be left blank  
h. **Hiring Status** – this should only be changed from Approved to Frozen if you have created a new position but the job requisition has been rejected and the position needs to be deactivated
10. Enter or update section 3 Budget Details if required, e.g. if the FTE on the Position needs to be increased:

When increasing FTE, continue to increase the total FTE to the required amount i.e. an FTE increase of 1 to an existing FTE of 5 would require an FTE of 6 to be entered into the FTE field.

11. In section 4 Impacted Assignments check that the changes you are making do not impact any current assignments then select Continue
12. In section 5 Comments and Attachments:

a. Enter supporting information in the Comments box.

b. In the Attachments section, to upload supporting documents, click on the down arrow next to Drag files here or click to add attachment, and select Add File. Navigate to the location where the document is stored, select it and the document name appears in the Attachments section.

This is where the Job Requisition Business Case form should be attached.
12. Before the form is submitted, you can review a section by clicking on the **Edit** button in the section heading to make any required modifications.

13. Finally, click the **Submit** button in the black banner to forward the request for approval and the **Home** page reopens.

**Glossary**

Please refer to the Glossary

**Appendix**

**Appendix 1 – Request a New Position reasons**

<table>
<thead>
<tr>
<th>New Position Request</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Requirement</td>
<td>To create a new position to meet new business requirements</td>
</tr>
<tr>
<td>New Funding</td>
<td>To create a position with a new funding source or due to growth</td>
</tr>
<tr>
<td>TUPE</td>
<td>To create a position within a new legal employer</td>
</tr>
<tr>
<td>Restructure/Reorganisation</td>
<td>To create a position to sit in a restructured department</td>
</tr>
<tr>
<td>Newly Established Business Unit</td>
<td>To create a position within a newly created business unit created due to expansion</td>
</tr>
</tbody>
</table>

**Appendix 2 – Request a Position Change reasons**

<table>
<thead>
<tr>
<th>Change Position Request</th>
<th>When to use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Position Hiring Status</td>
<td>Only use if job requisition rejected to inactivate position. A position can only be made inactive if there are no incumbents in the position and there are no future hires associated to it.</td>
</tr>
</tbody>
</table>
Grade Change | For regrading (generally down)
---|---
Increase FTE | Increase headcount

**Back to Step 7.**

**Appendix 3 – Position Naming Convention**

<table>
<thead>
<tr>
<th>Code</th>
<th>Family</th>
<th>Short Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Academic</td>
<td>ACAD</td>
</tr>
<tr>
<td>002</td>
<td>Clinical</td>
<td>CLIN</td>
</tr>
<tr>
<td>003</td>
<td>Professional, Administration and Operational</td>
<td>PAO</td>
</tr>
<tr>
<td>004</td>
<td>Technical</td>
<td>TECH</td>
</tr>
<tr>
<td>005</td>
<td>Veterinary Clinical</td>
<td>VET</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grade</th>
<th>Grade Band</th>
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</thead>
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<td>AC3A</td>
<td>D</td>
</tr>
<tr>
<td>AC3B</td>
<td>D</td>
</tr>
<tr>
<td>ACN2</td>
<td>C</td>
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<td>D</td>
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<td>----</td>
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<tr>
<td>RCB2</td>
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Back to Step 6.