



System User Guide

How to Create and Manage a Job Offer

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Introduction

This guide covers key tasks for **School/Department Administrators (SDAs)** and **Line Managers/Hiring Managers** in 'How to Create and Manage a Job Offer' system process. It is related to the [Guide to Recruitment and Onboarding](#).

This guide includes the steps for how to create, redraft and extend a job offer to a candidate. A redraft may be required if the job offer is rejected by HR Operations, or if it is rejected by the candidate, but the steps involved are the same.

Only the recruiter, hiring manager or offer specialist within the offer team can submit/edit an offer, collaborators are no longer be able to submit or edit the offer, this can be updated by the Recruiter by adding you as an Offer Specialist within the offer team.

Please **do not** download and edit an offer letter from the People and Money Offers page. Please refer to the offer letter [template library](#) . Please download the template, edit and save your offer letter in PDF format (to avoid editing) **prior** to completing the on-system steps.

If the candidate requires a PVG check for the role, please ensure the relevant clause from the template is included in the offer letter. Further guidance is available on the [Disclosure/PVG Checks](#) webpage.

Uploaded attachments are separated into **Candidate Facing** which are made available to the candidate and stored in the new hire's Documents of Record for future reference, and **Internal Documents** which are only visible to internal users e.g the recruiting team and HR Operations.

Please ensure that any **position** changes are made prior to the job offer being drafted.

You must add **allowances** (if applicable) to the **Other Compensation** section. If the allowance you need is not listed, please add this to the **Comments and Attachments** section.

The **Default Expense Account Code** must be added for all pending workers. This enables users to submit any future expense claims. This will be captured within the approved Job Requisition Business Case (JRBC) Form.

You can track the progress of the approval for an offer once submitted, see the section below on [Checking Offer Approval](#).

You can now **copy a job offer** where there are multiple or bulk offers to be extended. Please see the step by step details [below](#).

In Brief

This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

Creating a Job Offer

1. From the **Home** page, click on **My Team/My Client Groups** and select the **Hiring** app.

2. Find the relevant requisition and click on **Applications**.
3. Click the ellipsis button next to the candidate with the status **Offer, To Be Created**, and select **Create Job Offer**.
4. Select all relevant tiles in the **Create Job Offer** page and click **Continue**.
5. Complete the **When and Why** section and click **Continue**.
6. Complete the **Assignment Info** section and click **Continue**.
Notes:
 - Enter 0 hours per period into **Working Hours** field for Guaranteed Hours employees.
 - You must enter the **default expense account code**.
7. Review the **Offer Team section**. Remove any members that should not have access to offer information. Note that only the recruiter, hiring manager or offer specialist can raise or edit a job offer.
8. Complete the **Payroll Info** section and click **Continue**.
9. Complete the **Salary** section and click **Continue**.
10. If relevant, complete the **Other Compensation** section should any **allowances** be required. Click **Continue**.
Note: Use the comments section to list any not available in the app.
11. **Comments and Attachments** Use this section to provide comments and add attachments while drafting or editing job offers. These are visible to internal users and approvers, but not to candidates. You should include the details of any allowances you were unable to select in the additional compensation section. Click **Continue**.
12. If relevant, complete the required fields in the **Additional Info (for GH, Annualised and Fractional offers)** section and click **Continue**.
13. Complete the **Offer Letter Section**. Select the offer letter Offer Email Text and an expiration date (if required). Upload the pre-prepared offer letter and job description in the **Candidate Facing Documents** section then click **Continue**.
14. Click **Submit** to send the job offer for approval.

Saving a Draft Job Offer

1. In the job offer, complete the section that you are editing, ensuring there is no data missing from mandatory fields.
2. Click **Save and Close**.
3. The **Job Applications** page opens, and the status of the candidate with the unfinished offer is shown as **Offer, Draft**.
4. Click the **Home** button to return to the Home page.

Editing a Draft Job Offer

1. From the **Home** page, click on **My Team** and select the **Hiring** app.
Note: if you are an SDA please click on **My Client Groups** and select the **Hiring** app.
2. Click on **Offers**.
3. In the **Overview** page, find the relevant job requisition or candidate name. Click the ellipsis button next to the candidate with the status **Offer, Draft** and select **Edit Job Offer**.

4. In the **Edit Job Offer** page select all the relevant tiles and then click **Continue**.
5. Click on the **Continue** button until you navigate to section that you want to edit or to continue working from.
6. Refer to the appropriate steps for [Creating a Job Offer](#) above to continue.
7. Click **Submit** to send the offer to HR Operations for approval.

Extend a Job Offer

1. Click on **Offers**.
2. In the **Overview** page, find the relevant job requisition or candidate name. Check the status is **Approved**. Click the ellipsis button next to the candidate and select **Extend Offer**.
3. Enter the **expiry date**
4. Click **Extend**. The offer will be extended to the candidate.

Redrafting a Rejected Job Offer

1. View the email received or click the **Bell** icon to view the notification of the rejected job offer.
2. From the **Home** page, click on **My Team** and select the **Hiring** app.
Note: if you are an SDA please click on **My Client Groups** and select the **Hiring** app.
3. Click on **Offers tab**.
4. Select the candidate with the status **Offer, Approval Rejected**.
5. Click the ellipsis button and select **Redraft**.
6. This will move the candidate back to a **Draft** state. Locate the candidate and click the ellipsis button to **Edit Offer**.
7. Edit the job offer, following the steps taken to [Creating a Job Offer](#).
8. Click **Submit** to send the job offer for approval.

Checking the Approval Offer Approval

Please refer to [Checking Offer Approval](#) for detailed guidance.

Copy Job Offer

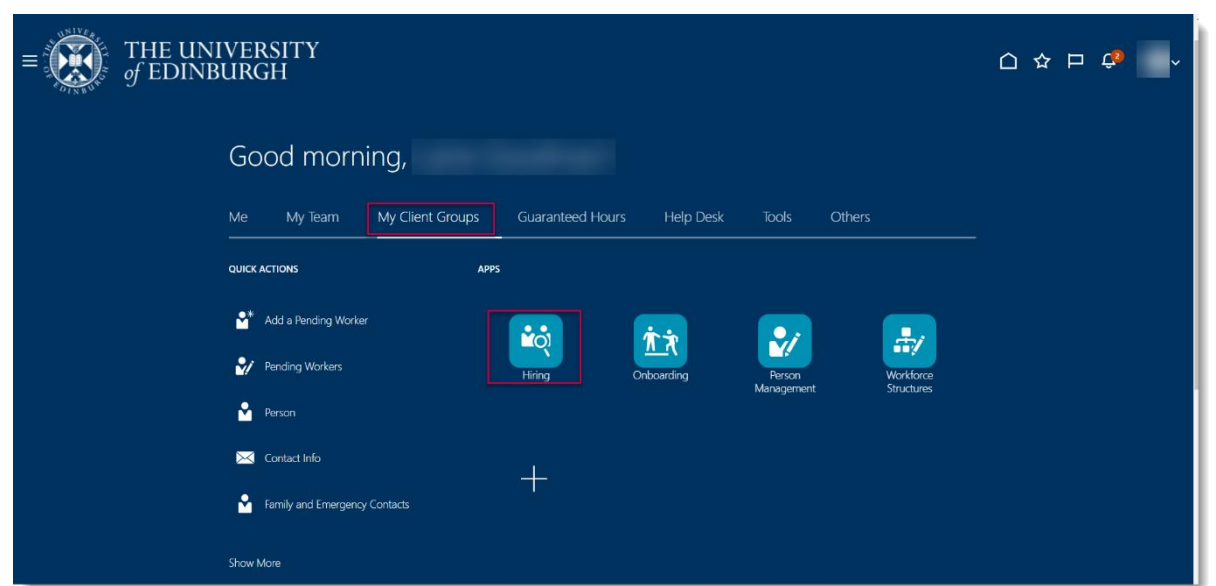
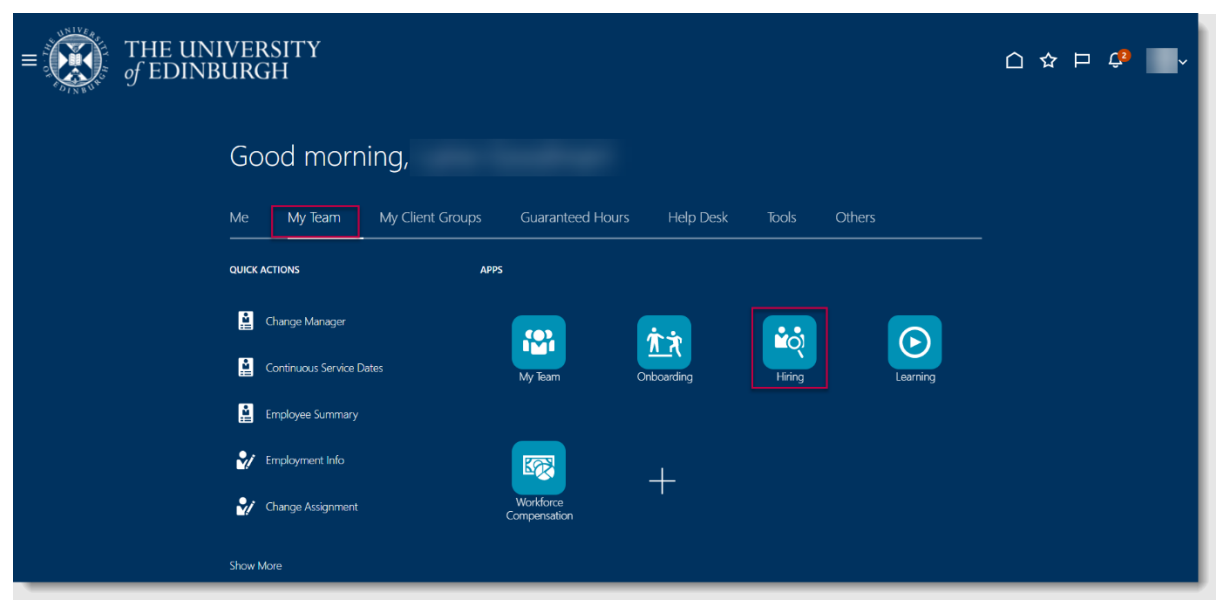
Please refer to [Copy Job Offer](#) for detailed guidance.

In Detail

This section provides the detailed steps and includes relevant screenshots from the system.


Creating a Job Offer

- 1. From the **Home** page, Line Managers should click on **My Team** and select the **Hiring** app. SDAs should click on **My Client Groups** and select the **Hiring** app.



- 2. The landing page will default to **Job Requisitions** and will display all requisitions you are a hiring

manager, recruiter or collaborator for. Find the relevant requisition and click on **Applications**.



THE UNIVERSITY
of EDINBURGH

Home

Notifications

Profile

Job Requisitions

Search by requisition title, number, or description

Q

Phase

State

Hiring Manager

Recruiter

Hiring Team Role Recruiter, Hiring Manager, Collaborator X

Location

Filters

Clear (1)

6 results

+ Create

Requisition Title

Requisition Number

Requisition Status

Applications

Prospects

Department

Creation Date

Actions

Project Administrator

Open - Expired

0

1

Psychology

18/09/2025

...

Senior Lecturer/Reader in ...

Open - Expired

0

0

Economics

28/01/2025

...

Operations Administrator

Open - Expired

0

0

Philosophy, Psychology a

9/01/2024

...

Student Digital Media An ...

Draft - In Progress

0

0

Philosophy, Psychology a

1/11/2021

...

Student Support Assistan

Open - Expired

0

0

Philosophy, Psychology a

1/10/2021

...

Undergraduate Teaching

Open - Expired

2

0

Philosophy, Psychology a

1/10/2021

...

Job Requisitions

Phase **Open**

State **Posted**

Hiring Manager

Recruiter

Hiring Team Role

Location

Filters

Clear (2)

55 results							+ Create
Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
EM INFLIGHT TESTING REQ 1	13435	Open - Posted	9	1	Literatures, Languages ar	27/11/2025	...
Rotating Intern in Equine Medicin	13419	Open - Posted	0	0	Veterinary Clinical Service	19/11/2025	...
Information Scientist	13415	Open - Posted	1	0	Royal Dick Veterinary Stu	19/11/2025	...

- Click the ellipsis button next to the candidate with the status **Offer, To Be Created**, and select **Create Job Offer**.

The screenshot displays the 'Undergraduate Teaching Office Administrator' interface. At the top, there's a green header with the University of Edinburgh logo and navigation icons. Below the header, the page title is 'Undergraduate Teaching Office Administrator (11/11/2021)' with a 'Standard' tab. A search bar labeled 'Keywords' is present. Below the search bar, there are filters: 'Show favorite job applications only', 'Candidate Type When Applying', 'Phase', 'State', 'Prescreening Question', and 'Filters'. A 'View' dropdown is set to 'UOE Default View'. The main content area shows a table of job applications. The table has columns: 'Favorite', 'Candidate name and number', 'Application status', 'Contact details', 'CV and submission date', 'Education', and 'Export'. Two applications are listed. The first application is selected, and a dropdown menu is open for it, showing options: 'Send Email', 'Send Message to Team', and 'Create Job Offer'. The 'Create Job Offer' option is highlighted with a red box.

Favorite	Candidate name and number	Application status	Contact details	CV and submission date	Education	Export
<input checked="" type="checkbox"/> ☆	...	Interview, 1st Interview to be scheduled Prescreening score: 0 out of 0	...	Resume 29/10/2021
<input type="checkbox"/> ☆	...	Interview, 1st Interview to be scheduled Prescreening score: 0 out of 0	...	Resume 25/10/2021

Dropdown menu for the first application:

- Send Email
- Send Message to Team
- Create Job Offer

4. If applicable, select the relevant tiles in the **Create Job Offer** page and then click **Continue**.
 - a. Other Compensation = for allowances
 - b. Additional Info = for GH, Annualised & Fractional info.

5. Enter or update the **When and Why** section and click **Continue**.

Select the **Action reason** as follows, (you may need to type the action name to find it):

- **Add Pending Worker** – Used when an external candidate is taking on a new assignment. Only used when no previous work relationship exists.
- **Add Assignment** – Used when existing employees are taking on an additional assignment
- **For Internal Secondments** the **Add Assignment** action should be used when single assignment holders are **moving in part** to secondment and retaining time in substantive post OR a multiple assignment holder moving from one of their assignments **in part to secondment**.
- **Transfer** – Used when an existing employee is leaving their current assignment(s) to take on a new assignment.
- **Secondment** - used when single assignment or multiple assignment holder is **moving in full** to secondment.
- **Add Pending Worker Relationship** – for rehires

6. Update the **Assignment Info** section, making sure to populate all mandatory fields, annotated with a *. Click **Continue**.

2
Assignment Info

*Business Unit
University of Edinburgh

Projected End Date
dd/mm/yyyy

*Position
Catering Assistant (A1) (PAO - Hospitality)

Job
Catering Assistant (A1) (PAO - Hospitality)

*Personal Job Title
Catering Assistant (A1) (PAO - Hospitality)

Grade Ladder
University Grade Ladder

*Grade
UE02

Step
UE02 - Step1

Department
ACE Catering

*Location
C&E Operations

Building

100% Off campus working (Approved flexible working only)
Select a value

Worker Category
Select a value

*Assignment Category
Fixed Term

Working Hours
35 Weekly

FTE
1

Start Time
8.30.AM

Working as a Manager
No

Fixed Term Reason Code
Student experience post (UoE student)

NHS Honorary Contract

Contract Review Date
dd/mm/yyyy

*Research/Teaching&Research/Teaching Only
1

*HESA Activity Standard Occupational Classification
Chief Executives and Senior Officials

*HESA Level
UCEA Level 2

HESA Reason for End of Contract

Clinical Increment Date
dd/mm/yyyy

Off-Campus Working Days (Approved Flexible Working only)

*Default Expense Account
110.110002.40022003.2410.00

Continue

Field Name	Guidance for completion
Business Unit*	Select relevant BU
Projected End Date	For fixed term contracts please provide
Position*	Populate this field if you have created a job requisition from a template or blank requisition.
Personal Job Title*	This automatically populates with the position name so it should be overwritten for a meaningful job title . This will also impact on correspondence e.g. contracts
Grade Ladder*	Defaults to appropriate
Grade*	As above
Step	Grade Step
Department	Select the relevant department
Location*	Location where employee will be based
Building	If applicable
100% Off Campus Working	Yes or No - Only to be updated to 'Yes' where it has been agreed that the employee will work 100% of time off campus.
Worker Category	Select the relevant worker category e.g Guaranteed Hours
Assignment Category*	Select the appropriate from the dropdown, e.g open ended, fixed term. Select Secondment when moving in full or part to a secondment post.
Working Hours	Defaults to 35 per week but can be amended, must be a weekly figure. For Guaranteed Hours assignments set the working hours to 0 per week to calculate a 0 FTE, and use the additional assignment information in a later section to record the details.
FTE	Automatically populates based on Working Hours

Working as a Manager	Yes/No
Fixed Term Reason Code	Must be provided for fixed term contracts.
NHS Honorary Contract	If applicable
Contract review Date	If applicable
Research/Teaching&Research/ Teaching only*	<p>1 - Academic Contract that is teaching only (applies only to contracts indicating that staff are teaching only. Teaching should include all related activities such as tutoring and preparation).</p> <p>2 - Academic Contract that is research only (should be used for those contracts where the primary academic employment function is research only, even though the contract may include a limited number of hours teaching (up to 6 hours per week or pro-rata for part-time staff).</p> <p>3 - Academic contract that is both teaching and research (applies to contracts that include 6 or more hours of teaching per week (averaged over the number of actual teaching weeks) as a minimum (pro-rata for part-time staff) and the remaining contract hours as research only).</p> <p>4 - Non academic contract</p> <p>9 - Academic Contract that is neither teaching nor research (should be used for academic contracts where the primary employment function is not teaching and/or research).</p> <p>If a contract is for both academic and non-academic work then the appropriate code from 1 to 3 should only be used where the primary employment function is teaching and/or research.</p>
HESA Activity Standard Occupational Classification*	HESA Activity Standard Occupational Classification-select the appropriate option. For subsidiaries please select the code which matches closest the type of role. For subsidiaries this information will not be returned as part of the HESA submission. For HESA Standard Occupational Classification view the Staff 2025/26 - Activity Standard Occupational Classification HESA
HESA Level*	This is now a mandatory field, please use the table below to select the appropriate HESA level according to the grade of the position being offered. Note staff in subsidiaries should use 'XpertHR Level N' in all instances.
Clinical Increment Date	If applicable
Off Campus Working Days (Approved Flexible Working Only).	<p>If a Flexible Working arrangement agreed (as per the Flexible Working Policy) please enter the days of the week the employee will be working off campus, e.g. Monday and Friday every week. If they will be working set days off campus over a different pattern to weekly (e.g fortnightly) please provide the details in this section (e.g. every other Friday from home).</p> <p>Note - It is important to provide this information here as this will provide HR Operations with the details required for the contract when it is requested. This field has a 150 character limit.</p>
Default Expense Account Code*	Must be added – please refer to the approved Job Requisition Business Case Form.

	Please note in most circumstances the default expense account code will be the same as the salary costing code. The default expense code cannot be split.
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HESA LEVEL

STAFF LEVEL CODE	STAFF LEVEL DESCRIPTION	GRADES ASSIGNED TO STAFF LEVEL CODE	ADDITIONAL CRITERIA
A0	Vice-Chancellor/Principal/Head of Initiation	Principal only	
B0	UCEA level 2	Vice-Principal/University Secretary	
C1	UCEA level 3A	Report to run by HR to identify this grouping	
C2	UCEA level 3B	College Registrar	
D1	UCEA level 3/4A1	Report to run by HR to identify this grouping	
D2	UCEA level 3/4A2	Report to run by HR to identify this grouping	
D3	UCEA level 3/4A3	Report to run by HR to identify this grouping	
E1	UCEA level 4A	XM1	
E2	UCEA level 4B	Report to run by HR to identify this grouping	
F1	UCEA level 5A	AC4, AM4, ACN4, AMN4, ACT4, AMT4 UE10 / OTHS Academic staff	
F2	UCEA level 5B	UE10 / OTHS Non-Academic staff (e.g. Professional services staff)	
IO	XpertHR level I	UE09, ECA8, AC3A, AC3B, ACN3, ACT3, AM3A, AM3B, AMN3, AMT3, ARW2, XM2A, XM2B	ARC ON SPINAL POINT 39, 40, 40, 44, 45, 46, 54, 58, 62, 66
JO	XpertHR level J	UE08, ECA7, AC2, AM2, ACN2, AMN2, ARW1, MC3, XM3A, XM3B, RCB3	ARC ON SPINAL POINT 37, 38, 49, 50, 60, 61, 65
K0	XpertHR level K	UE07, UE7N, ECA6, MC2, AFC7, ECA6, XM4A, XM4B, RCB4	ARC ON SPINAL POINT 29, 30, 30, 36, 41, 42, 47, 48, 51, 52, 53, 55, 56, 57, 59, 63, 64
L0	XpertHR level L	UE06, UE6N, ECA5, SDS1, MCA, MC1, AFC6, ECA5, XM5A, XM5B, RCB5, K375	
M0	XpertHR level M	UE05, UE04, UE5N, ECA4, AFC5, RCB6, XM6B	
N0	XpertHR level N	UE03, TR01, ECA3, MA1, MA3, RCB7, XM6A	
O0	XpertHR level O	UE02, ECA2, RCB8	
P0	XpertHR level P	UE01, ECA1	

Default Expense Account Code

These are mandatory fields. Select the icon at the right of the field

Default Expense Account



Complete all fields as per the details under 'Default Expense Account Code' on the approved Job Requisition Business Case form. Then press OK. The table below shows the default values, you must use the cost centre

relating to the school or department.

	Code to use
Entity	110
Fund	110002
Cost Centre	From the JRBC Form
Account	2410
Analysis	000000
Portfolio	00000000
Product	00000000
Intercompany	000

Default Expense Account

Hide Segments

Entity

Fund

Cost Centre

Account

Analysis

Portfolio

Product

Intercompany

Spare 01

Spare 02

000000

00000000

00000000

000

000000

000000

No Analys

No Portfoli

No Produc

No Entity

No Spare

No Spare

Search

Reset

OK

Cancel

7. Enter or update the **Offer Team** section and click **Continue**.

It is important to review the Offer team at this point. Offer team members are automatically populated with the Hiring Manager, Recruiter and Offer Specialist that were added when the requisition was set up. Offer team members will receive notifications and have access to offer information such as salary. **You must therefore review and remove any members at this stage who should not have access to this information.**

Note – It is only the recruiter, hiring manager or offer specialist within the hiring team that can submit/edit an offer. If you experience any problems updating the offer team you should submit a Service Request using the category System Related providing the requisition number.

3 Offer Team

Hiring Manager

Recruiter

Add Collaborator Type

Add Collaborator Type

Offer Specialist

[Add Another Offer Specialist](#)

Continue

8. In the **Payroll Info** section select **UoE Group Payroll** in the **Payroll Frequency** section then select **University of Edinburgh** as the **Tax Reporting Unit**. Click **Continue**.

4 Payroll Info

Payroll Frequency

*Payroll

Other Info

*Tax Reporting Unit

Continue

5 Salary

9. Select **Annual Salary** in the **Salary** section and click **Continue**.

5 Salary

*Salary Basis
Annual Salary

*Salary Amount
20,130.00 GBP Annually

Annual Salary
20,130.00 GBP (FTE 1)

Grade Ladder
University Grade Ladder

New Salary
20,130.00 GBP Annually

Grade Name
UE04

Grade Step
UE04 - Step 1

Salary Range
- GBP Annually

Continue

6 Other Compensation


10. The **Other Compensation** section will be used to add details of **allowances**. There are 11 allowances that can be selected, some are based on eligibility criteria:

- Contractual Overtime
- Deans Honorarium
- Head of School
- London Weighting Allowance
- On Call Payment
- Overseas Supplement
- Premium Bands
- Royal Society Award
- Wardens Allowance
- Wellcome Trust Allowance
- Wellcome Trust Fellowship

To add an allowance, select **+Add**. If the allowance you require is not listed please include this information in the **Comments and Attachments** section below and use the 'Attachments-Internal Document' to supply any supporting documentation/rationale.

6 Other Compensation

+ Add



There's nothing here so far.

Continue

In the example, note that the chosen **Plan** information will display in the dialog box and provide guidance.

6 Other Compensation

OK

Cancel

*Plan

London Weighting Allowance

*Option

London Weighting Allowance

*Start Date

08/02/2022

End Date

08/02/2022

☐ Ongoing

*Amount

3,000.00

*Periodicity

Annually

Work Units Conversion Rule

UoE Rate Annualized

Hours Worked

Pay Value

Hide Plan Info

Allowance Description

Payable to those who, as a condition of employment, are required to normally work in London or parts of Greater London and as a consequence are required to live in London or within daily commuting distance.

What information do I need to enter?

You must enter a start date and end date for this allowance. London Weighting in most cases will be ongoing with no end date, so you should enter 31/12/2066 in the end date field. If there will be a specific end date for the allowance you should add that date.

The 'Amount' field defaults to 3,000.00 and is the annual amount the employee will receive. Do not override this value. The annual amount will be divided by 12 (months in the year) and paid in monthly instalments to the employee.

Leave the 'Pay Value' field blank as this is for payroll use only.

Continue

7 Attachments

Select **OK** and a summary box will display.

Note that further Allowances may be added here by selecting **+Add**.
Select **Continue**. To move to next section

6 Other Compensation

London Weighting Allowance London Weighting Allowance 23/08/2022 - 23/08/2022	3,000.00 GBP Recurring
---	--------------------------

+ Add

Continue

11. Comments and Attachments

Use this section to provide comments and add attachments while drafting or editing job offers. These are visible to internal users and approvers, but not to candidates. You should include the details of any allowances you were unable to select in the additional compensation section and use the Attachments-Internal Documents should there be any supporting documents/rationale you want to provide.

7 Comments and Attachments

Offer Comments

Use this section to provide comments and add attachments while drafting or editing job offers. These are visible to internal users and approvers but not to candidates.

Internal Documents

Drag files here or click to add attachment ▼

Continue

Click on the down arrow next to **Drag files here or click to add attachment**. Select **Add Files** and navigate to the location where the file is stored and select it.

Please note that the file name of any attachments added to internal documents must not exceed 75 characters (including spaces) as we have discovered that this is causing some records to fail during the HR processing stage. This may mean you need to rename the files before attaching them. HR Operations will reject the request if there are any attachments with a file name exceeding 75 characters.

12. If relevant, complete the required fields in the **Additional Info** section and click **Continue**. This is required for all Guaranteed Hours, Annualised and Fractional Contracts.

8 Additional Info

*Contact Number for Hiring Manager <input type="text" value="0131111111"/>	Average weekly working hours (Annualised only) <input type="text"/>
Total number of hours for period (GH only) <input type="text"/>	Comments for HR Operations (Read only - from May 2022 use new comments section)
Period hours cover (GH only) <input type="text"/>	
Annually Reviewed (GH Only) <input type="text"/>	
Number of hours per year (Annualised/Fractional only) <input type="text"/>	
Number of weeks per year (Fractional only) <input type="text"/>	
Term time only (Annualised/Fractional only) <input type="text"/>	

Continue

For Guaranteed Hours Offers:

- **In the Total number of hours for period (GH only) field** - enter the minimum hours to be guaranteed in the initial GH period.

In the Period Hours cover (GH only) field - select from one of the available drop down options (see below table in [Appendix 2](#) for guidance and description). **Please note you should only select one of the following options:**

- **Per Year = if the contract is for a year or longer**
- **Over Period of GHC = if the contract is for less than a year**
- **In the Annually reviewed (GH only) field** - select whether you intend to review the GH minimum hours each year. For use in Per Year only, (see below table in [Appendix 2](#) for guidance and description).
- **Annualised Hours Offer** – Enter **Number of hours per year** and **Average weekly working hours**. Select appropriate value for **Term time only**.
- **Fractional Hours Offer** - Enter **Number of hours per year** and **Number of weeks per year**. Select appropriate value for **Term time only**.
- **Comments for HR Operations**- - no longer in use you should use the offer comments in previous screen.

13. In the **Offer Letter** section select the offer letter **Offer Email Text**, select an **expiration date (if required)** and attach the **pre pre-prepared offer letter and job description** to the candidate facing documents section.

Tips

The offer letter templates are available from the [offer letter library](#). Please download, edit and save as a PDF before you upload to the Offer Letter section.

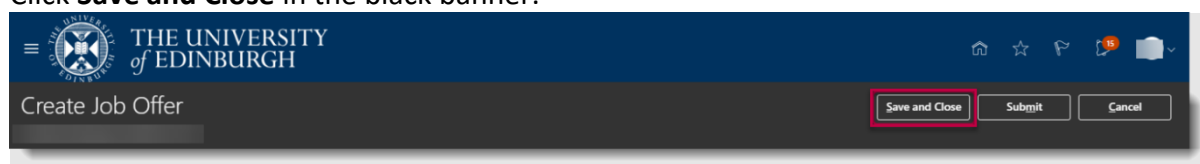
Please note that the **file name** of any attachments added to the candidate facing documents **must not exceed 75 characters** (including spaces) as we have discovered that this is causing some records to fail during the HR processing stage. This may mean you need to rename the files before attaching them. HR Operations will reject the request if there are any attachments with a file name exceeding 75 characters.

14. Click **Submit** to send the job offer for approval.

Saving a Draft Job Offer

It is not necessary to complete the job offer all at once as a draft copy can be saved and completed later.

1. In the job offer complete the section that you are editing, ensuring there is no data missing from mandatory fields.
2. Click **Save and Close** in the black banner.



3. The **Job Applications** page opens, and the status of the candidate with the unfinished offer is shown as **Offer, Draft**.

< **Undergraduate Teaching Office Administrator** (77777) Standard

Job Applications

Keywords

Show favorite job applications only Candidate Type When Applying Phase State Prescreening Question Filters

View UOE Default View

2 items Move Application More Actions

Sort By Application Submitted, New to Old

Favorite	Candidate name and number	Application status	Contact details	CV and submission date	Education	Exp
<input type="checkbox"/> ☆ ●		Offer, Draft Prescreening score: 0 out of 0	Edinburgh, GB	Resume 29/10/2021		...
<input type="checkbox"/> ☆ ●		Offer, Draft Prescreening score: 0 out of 0	Edinburgh, GB	Resume 25/10/2021		...

- Click the **Home** button to return to the Home page.

Editing a Draft Job Offer

- From the **Home** page, click on **My Team** and select the **Hiring** app.

Note: if you are an SDA please click on **My Client Groups** and select the **Hiring** app.

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Good afternoon, [Name]

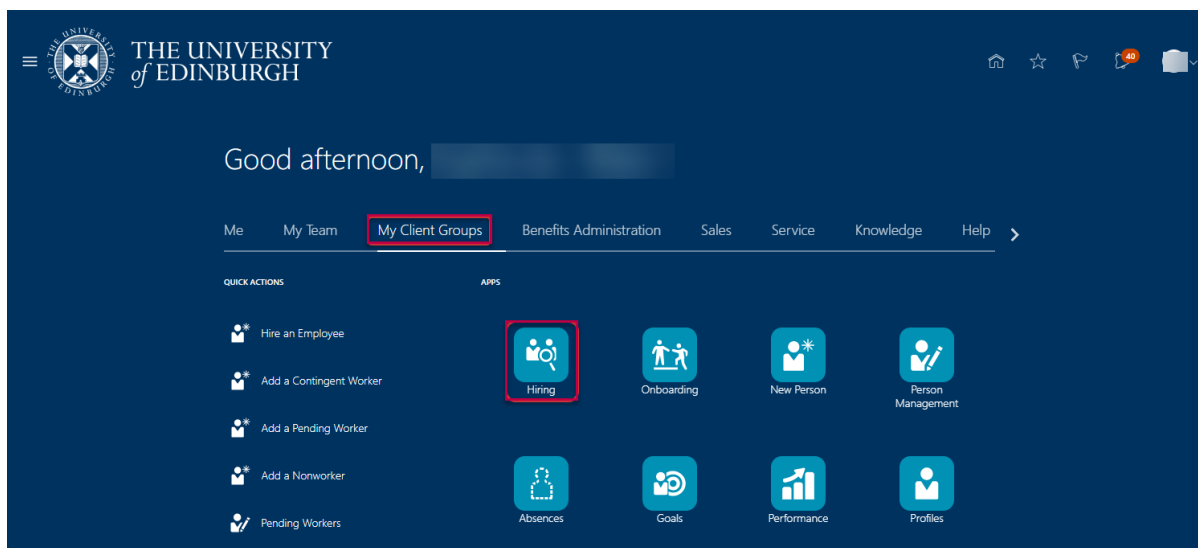
Me **My Team** My Client Groups Sales Service Help Desk Tools Others

QUICK ACTIONS

- Change Manager
- Seniority Dates
- Employment Info
- Add Assignment
- Document Records

APPS

- My Team
- Onboarding
- Hiring**
- Users and Roles
- New Person
- Workforce Modeling
- Workforce Predictions



2. Click on **Offers**.

Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Academic and Student Ac		Draft - In Progress	0	0	Academic and Student Ac	28/11/2025	...
Academic Facilitator (C1)		Draft - In Progress	0	0	Centre for Inflammation F	28/11/2025	...
Academic Developer (C1)		Draft - In Progress	0	0	Institute for Academic De	28/11/2025	...
Academic and Student Ac		Draft - In Progress	0	0	Academic and Student Ac	28/11/2025	...
Academic and Student Ac		Draft - In Progress	0	0	Academic and Student Ac	28/11/2025	...
Academic Developer (C1)		Draft - In Progress	0	0	Institute for Academic De	28/11/2025	...
EM INFLIGHT TESTING R		Approval - Pending	0	0	Literatures, Languages ar	27/11/2025	...
EM INFLIGHT TESTING R		Job formatting - In Progre	0	0	Literatures, Languages ar	27/11/2025	...
EM INFLIGHT TESTING R		Open - Posted	9	1	Literatures, Languages ar	27/11/2025	...

3. In the **Overview** page, find the relevant job requisition or candidate name. Click the ellipsis button next to the candidate with the status **Draft** and select **Edit Job Offer**.

Job Offers									
Search by offer name, requisition number or candidate									
State Draft X Proposed Start Date 1/12/2025 - 31/05/2026 X Candidate Type Job Offer Team Role Filters Clear (2)									
5 results									
Offer Name	Requisition Number	Candidate Name	State	Projected Start...	Hiring Manager	Recruiter	Department	Business Unit	Actions
Part Time Cleaner			Draft	1/12/2025			Cleaning/Servitorial/Non	University of Edinburgh	...
Part Time Cleaner			Draft	6/01/2026			Cleaning/Servitorial/Non	University of	Edit Offer
Photographic Archivist (F			Draft	2/03/2026			Heritage Collections (Res	University of	Move
Postdoctoral Research As			Draft	8/12/2025			Institute of Molecular Plai	University of Edinburgh	...
Research Fellow (Barnah			Draft	12/01/2026			Social Work	University of Edinburgh	...

4. If applicable, select the relevant tiles in the **Edit Job Offer** page and then click **Continue**.
 - a. Other Compensation = for allowances
 - b. Additional Info = for GH, Annualised & Fractional info.

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Edit Job Offer

Continue Cancel

What would you like to do while working on this job offer?

☐ Other Compensation

☐ Additional Info

6. The job offers opens in section **1. When and Why**. Click on the **Continue** button until you navigate to the

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Edit Job Offer

Save and Close Submit Cancel

1 When and Why

*When is the employee start date? 5/10/2020

*Action Promotion

*Legal Employer University of Edinburgh

*Worker Type Employee

Continue


2 Assignment Info

section that you want to edit or to continue working from.




- 7. Refer to the appropriate steps in [Creating a Job Offer](#) above to complete the offer.
- 8. Click **Submit** to send the offer to HR Operations for approval.

Extend a Job Offer

- 1. Click on **Offers**.



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Job Requisitions

Search by requisition title, number, or description

Phase

State

Hiring Manager

Recruiter


Hiring Team Role

Location

Filters

1,523 results

+ Create



Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Academic and Student Ac		Draft - In Progress	0	0	Academic and Student Ac	28/11/2025	...
Academic Facilitator (C1)		Draft - In Progress	0	0	Centre for Inflammation F	28/11/2025	...
Academic Developer (C1)		Draft - In Progress	0	0	Institute for Academic De	28/11/2025	...
Academic and Student Ac		Draft - In Progress	0	0	Academic and Student Ac	28/11/2025	...
Academic and Student Ac		Draft - In Progress	0	0	Academic and Student Ac	28/11/2025	...
Academic Developer (C1)		Draft - In Progress	0	0	Institute for Academic De	28/11/2025	...
EM INFLIGHT TESTING R		Approval - Pending	0	0	Literatures, Languages ar	27/11/2025	...
EM INFLIGHT TESTING R		Job formatting - In Progre	0	0	Literatures, Languages ar	27/11/2025	...
EM INFLIGHT TESTING R		Open - Posted	9	1	Literatures, Languages ar	27/11/2025	...

Requisitions

Offers

2. In the **Overview** page, find the relevant job requisition or candidate name. Check the state is at **Approved**. Click the ellipsis button and select **Extend Offer**.

Search by offer name, requisition number or candidate						
State 5	Proposed Start Date	Candidate Type	Job Offer Team Role	Filters	Clear (5)	
Part Time Cleaner	Pending Ap	1/12/2025	Cleaning/Servitorial/Non	University of Edinburgh	...	
Research Assistant (News	Pending Ap	1/12/2025	Design	University of Edinburgh	...	
Business Development E	Approved	24/06/2024	Business Development	Edinburgh Innovations Lt	...	
Chemical Undergraduate	Approved	31/05/2021	Engineering	University of Edinburgh	...	
Chemical Undergraduate	Approved	31/05/2021	Engineering	University of	Move	
Chemical Undergraduate	Approved	31/05/2021	Engineering	University of	Redraft	
Civil Undergraduate Interi	Approved	31/05/2021	Engineering	University of	Extend Offer	
Civil Undergraduate Interi	Approved	31/05/2021	Engineering	University of	Change Start Date	
Civil Undergraduate Interi	Approved	31/05/2021	Engineering	University of Edinburgh	...	

3. Enter the **expiry date** for the job offer. This defaults to one week from the date you are on.

Extend offer

When does the offer expire?

Expiration Date
9/12/2025

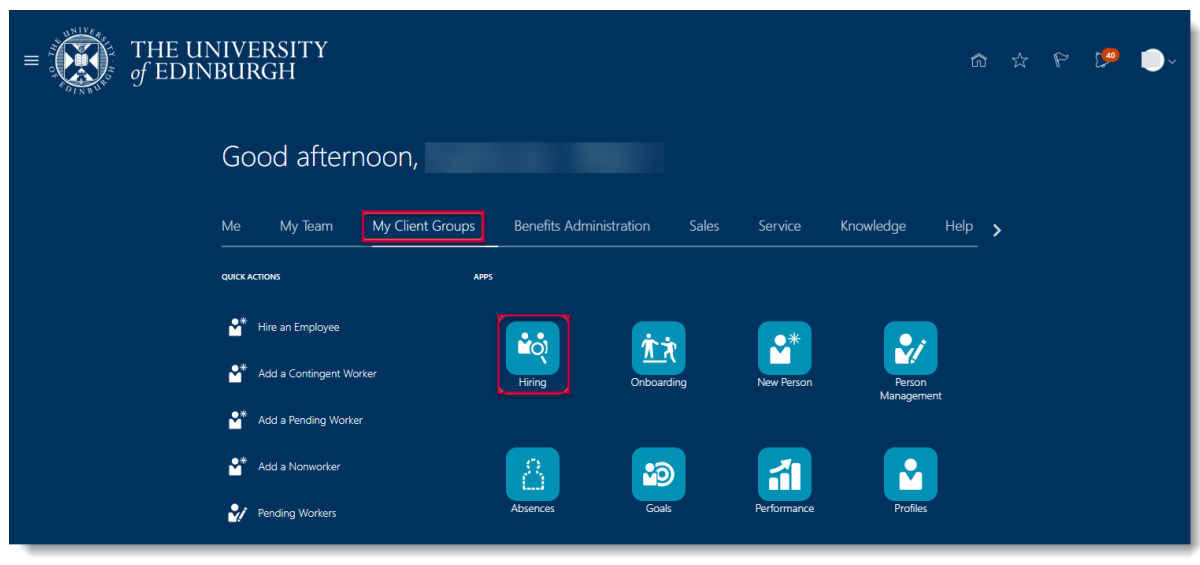
Cancel

Extend

- Click **Extend**. The offer will be extended to the candidate.
- For **external candidates**, once the **offer is accepted** follow the steps in the [How to Hire an External Candidate](#) user guide. Internal Candidates are **automatically moved to HR** once the offer is accepted. The candidate will then move to the HR Phase. Please see [Appendix C](#) below for details.

Redrafting a Rejected Job Offer

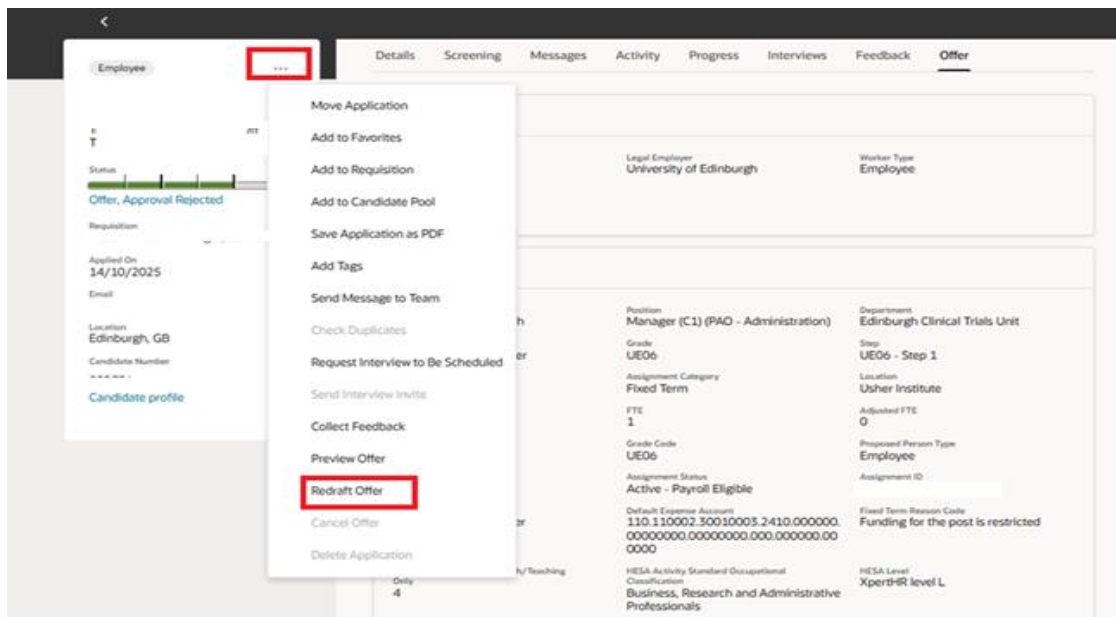
- View the email received or click the **Bell** icon to view the notification of the rejected job offer.
- From the **Home** page, Line Managers should click on **My Team** and select the **Hiring** app or if you are an SDA please click on **My Client Groups** and select the **Hiring** app.



- Click on the **Offers** tab.
- Select the requisition with **Approval Rejected** status and click on Offer Name corresponding to the candidate with an Approval Rejected Status

Job Offers												
Search by offer name, requisition number or candidate												
<div> <div>State: Approval Rejected</div> <div>Proposed Start Date</div> <div>Candidate Type</div> <div>Job Offer Team Role</div> <div>Filters</div> <div>Clear (1)</div> </div>												
9 results												
Offer Name	Requisition Number	Candidate Name	State	Projected Start...	Hiring Manager	Recruiter	Department	Business Unit	Legal Employer	Job Name	Position Name	Work Location
Assistant Data Manager	13095		Approval Rejected	1/01/2026			Edinburgh Clinical Trials L	University of Edinburgh	University of Edinburgh	Manager (C1) (PAO - Adm	Manager (C1) (PAO - Adm	Usher Institute, Edinburgh
Chemical Undergraduate	754		Approval Rejected	7/06/2021			Engineering	University of Edinburgh	University of Edinburgh	Administrator (A1) (PAO -	Administrator (A1) (PAO -	Faraday Building, Edinbu

- From the candidate details screen, click on the ellipsis and select **Redraft Offer**.

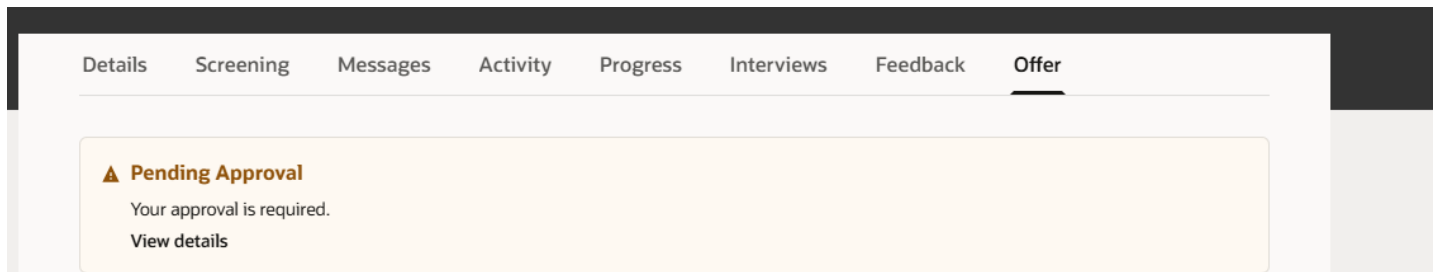


6. This will move the candidate back to a **Draft** state. Locate the candidate and click the ellipsis button to **Edit Offer**.
7. Follow the steps in [Editing a Draft Job Offer](#) above to continue.
8. Click **Submit** to send the offer to HR Operations for approval.

Checking the Offer Approval Process

Job offer initiators, approvers, and observers can track how job offers are moving through the approval process by viewing banners displayed on the Candidate Profile Details, Offer tab.

From the Hiring App, click on the offers tab and then click on the name of the offer you wish to view, the candidate profile will then open, navigate to the offers tab to view the banner message.



Job offer initiators and approvers can also click the **View Details** link on these banners to see more details, for example viewing the whole offer or seeing who the next approver in line is. They can also take actions on the offer such as approving or withdrawing it from approval.

Banners are displayed when: -

- An offer is submitted for approval.
- An offer approval is underway.
- An approver requested more info about the offer.
- The offer initiator needs to provide more info about the offer.

Banner for Offer Approval in Progress Banners are also displayed on the Candidate Profile Details, Offer tabs when-

- An offer is extended
- An offer will be extended at a certain point in the future, if the selection process is configured to automatically extend job offers.
- There are any issues while trying to extend an offer.
- There are any issues while using the Move to HR action.

Copy Job Offer

This functionality can be used to help hiring teams process multiple or bulk offers quickly where the offer details are the same. Note: it is only possible to copy offers for external candidates (new hires and rehires), this functionality is not possible for internal transfers or additional posts.

Before you start

- You must start by creating one offer from the list of successful candidates
- All other application statuses should also be updated e.g. Rejected after interview
- Check that the number of openings on the requisition matches the number of offers you wish to copy. If more openings are required please send a Service Request using category 'Advertising' and title

‘Increase Opening on Req # xxxx’ to increase the number of openings before you continue, please attach the Job Requisition Business Case Form showing the approval of additional FTE. The system will flag an error if there is not enough openings.

- To copy an existing offer the person copying the offer must be part of the offer team for the first offer.
 - It’s preferable to select a recent offer to copy because it contains active values. Older offers on this requisition may no longer be selectable, or if they have values that aren’t current anymore then the copying will be unsuccessful.
1. Create one offer from the list of successful candidates, following the steps above ‘[Creating a Job Offer](#)’. The Job offer can be saved as a draft or can be submitted for approval.
 2. Next, select the additional candidates that will also need an offer created.

The screenshot shows the 'Part Time Cleaner' job application page. At the top, there's a header with the job title and a 'Standard' button. Below the header is a search bar and several filter buttons: 'Show favorite job applications only', 'Candidate Type When Applying', 'Phase', 'State', 'Prescreening Question', and 'Filters'. On the right, there's a 'View UOE Default View' dropdown and a 'Sort By Application Submitted, New to Old' dropdown. The main content area displays a table of candidates. The first two rows are highlighted in light blue. The first row is for a candidate named 'Offer, Draft' with a 'Prescreening score: 0 out of 0' and a 'Resume' link. The second row is for a candidate named 'New, To be Reviewed' with a 'Prescreening score: 0 out of 0' and a 'Resume' link. A red box highlights the checkboxes in the first two rows, indicating they are selected.

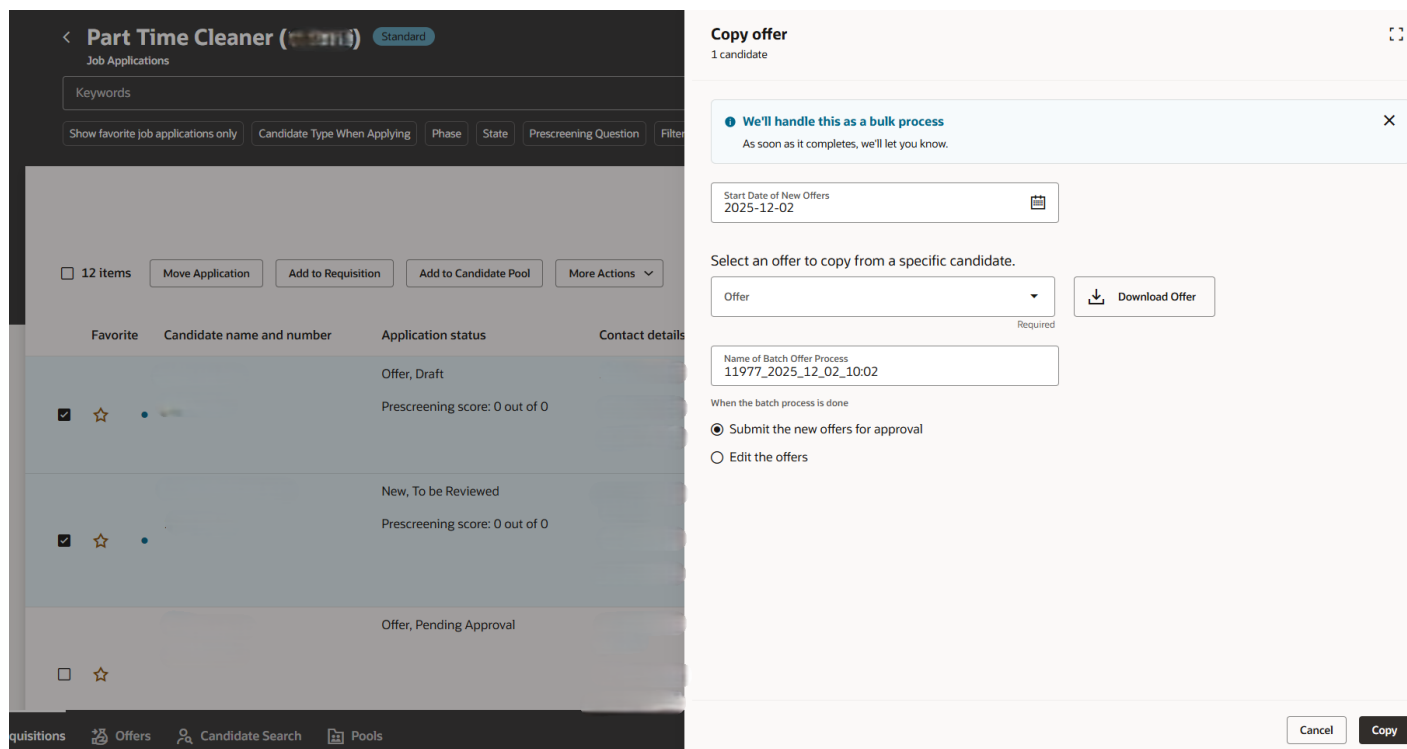
Favorite	Candidate name and number	Application status	Contact details	CV and submission date	Education	Exp
<input checked="" type="checkbox"/>	[Candidate Name]	Offer, Draft Prescreening score: 0 out of 0		Resume 22/11/2025		...
<input checked="" type="checkbox"/>	[Candidate Name]	New, To be Reviewed Prescreening score: 0 out of 0		Resume 21/11/2025		...

3. Click **More Actions** and copy offer

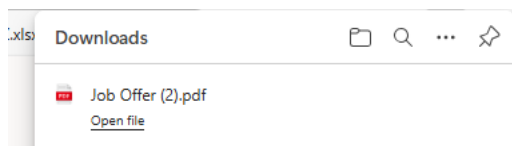
The screenshot shows the 'Part Time Cleaner' job applications interface. At the top, there's a header with the job title and a 'Standard' button. Below it is a search bar for 'Keywords' and a row of filter buttons: 'Show favorite job applications only', 'Candidate Type When Applying', 'Phase', 'State', 'Prescreening Question', and 'Filters'. The main area displays a table of job applications. The 'More Actions' dropdown menu is open, showing various options. The 'Copy Offer' option is highlighted with a red box. The table columns include 'Favorite', 'Candidate name and number', 'Application status', 'CV and submission date', 'Education', and 'Exp'.

4. Under the Offers section:

- Select the **start date** for the new offers
- In the "Offer to copy from candidate" select the candidate with the offer that you wish to copy (as previously created).
- In the Name of Batch Offer Process field, you can use the default name for the batch offer process which includes the requisition number and the current date and time. Or you can set a new one. This name is useful for tracking all of these newly-copied offers on the Job Offers list.
- Select "**Edit the Offers**" – This is because the individuals offer letter will need to be attached.
- Then click **Copy**.



Download Offer Details - If the user wants to check the offer details for the candidate the offer is being copied for they can click “Download Offer”. This will generate a PDF table of the offer details for the offer being copied. This will appear as a PDF at the top of the screen.



All of the content and attachments on their offer will be copied to create new job offers for the other selected candidates.

Example of Download Offer

UE07 - Step 1

Job Offer [REDACTED]

Offer Recipient Details

UE07 - Step 1

Display Name	[REDACTED]
Personal Email Address	[REDACTED]
Personal Phone Number	
Work Email Address	
Work Phone Number	
Home Address	
Candidate Type	ORA_EXTERNAL_CANDIDATE
Person Number	

Offer Details

Job Offer Title	[REDACTED]
Creation Date	1/12/2023 5:24:57 PM
Created By	[REDACTED]
Comments	
Phase	Offer
State	Draft
Accepted Date	
Accepted On Behalf	N
Accepted On Behalf By	
Accepted On Behalf Date	
E Signature Full Name	
E Signature IP Address	
E Signature Date	
Expiration Date	
Additional Text 1	
Additional Text 2	
E Signature Statement	Please provide your signature to accept your job offer.
Offer Letter Template Name	

Assignment Details

Assignment Name	[REDACTED]
Legal Employer	University of Edinburgh
Hire Date	1/12/2023
Worker Type	Employee
Business Unit Name	University of Edinburgh
Job Name	[REDACTED]
Grade	UE07

- Once the copy offer process has been submitted it will take a little while to process. You will be alerted when it is complete. You can also tell the process is complete because the Phase and State will change to Offer-Draft.
- You must now attach each individual offer letter for each candidate. Follow the steps in the section [Editing a Draft Job Offer](#), this also gives you an opportunity to check the offer details.
- Once you are ready submit the offer for HR approval.
- Once approved follow the steps to [Extend the Job Offer](#) above.

What happens after submitting the batch copy offer process?

When you submit the Copy Offer action, here's what can happen:

- If the batch copy offer process is successful, all of the offer content and attachments on the offer are copied to create new job offers for the selected candidates.
- If there are warnings, the new offers still get copied.
- If there are errors, the batch copy offer process stops.

The table presents possible warnings and errors that can occur during the batch copy offer process.

Warning or Error	Scenario
Warning	The original offer letter was adjusted to include specific info about the candidate. You'll see a warning message asking you to update each new candidate's offer letter after it gets copied. Copies will then be created.
Error	The recruiter or hiring manager on the original offer is no longer working for the company. The batch copy offer process can't proceed. You'll see an error message asking you to select a different candidate's offer to be copied.
Error	The original offer has no salary amount or no offer letter, or the job requisition doesn't have enough openings left to accommodate all of the candidates selected (and you don't have the privilege Communicate Job Offer Ignoring Number of Openings).

In case of any failure, all of the selected candidates will likely have a partially-created offer but you will have to check the Errors section for each candidate's offer to see which regions' fields were unable to be copied. For example:

- The Assignment section may not be filled out for all the new candidates if the original offer's assignment had a location or grade that's currently inactive.
- The Other Compensation section may be empty for all the new candidates if they don't satisfy the eligibility profile or element eligibility for the original offer's Individual Compensation Plan.

These incomplete new offers will remain in the status Offer - Draft so that the missing values can be manually provided as needed, even if the option selected when copying the offer was "Submit new offers for approval". When each offer is edited to be complete, you can submit them individually for approval.

As soon as the batch copy offer process is finished, you may receive a notification if this was configured by your administrator. The notification indicates the number of offers that were successfully copied as well as the number of offers that failed, were skipped, or cancelled.

Appendix

Appendix A – Job offer templates

All templates are available from the [template library](#)

Name	When to select
Open Ended	New employees. If Open ended Grades 1-10 (not GH, Annualised or Fractional)
Fixed Term	New employees. If Fixed-term Grades 1-10 (not GH, Annualised or Fractional)
GH Open Ended	If GH Open ended Grades 1-10
GH Fixed Term	If GH Fixed-term Grades 1-10
Annualised Open Ended	If Annualised + Open Ended all grades
Fractional Open Ended	If Fractional+ Open Ended all grades
Fractional Fixed Term	If Fractional+ Fixed term all grades
Additional post Open Ended	If Open ended Grades 1-10 - Existing employees taking on a new post and retaining another
Additional post Fixed Term	If fixed-term Grades 1-10 - Existing employees taking on a new post and retaining another
Internal Secondment	All grades. Existing employee taking on a secondment post but will return to primary post.
Internal Transfer - Fixed Term	If fixed-term Grades 1-10 - Existing employees taking on a new post which will be their only post
Internal Transfer - Open Ended	If Open ended Grades 1-10 - Existing employees taking on a new post which will be their only post
ACE Campus – Fixed Term	ACE Campus only. If Fixed-term Grades 1-10 (not GH, Annualised or Fractional) - New employees
ACE Campus – Open Ended	ACE Campus only. If Open ended Grades 1-10 (not GH, Annualised or Fractional) - New employees
ACE Catering – Open Ended	ACE Catering only. If Open ended Grades 1-10 (not GH, Annualised or Fractional) - New employees
ACE Catering – GH Open Ended	ACE Catering only. If GH Open ended Grades 1-10
ACE Hotels – Open Ended	ACE Hotels only. If Open ended Grades 1-10 (not GH, Annualised or Fractional) - New employees
ACE Hotels – GH Open Ended	ACE Hotels only. If GH Open ended Grades 1-10
ACE & Estates – Internal Secondment	ACE & Estates only. All grades. Existing employee taking on a secondment post but will return to primary post.

Appendix B – Description for Guaranteed Hours Period Hours Cover / Number of Hours Period Field

Option	Description	When to use
Over Period of Current GHC Use this for contracts less than a year	Minimum hours to be guaranteed for full duration of GH contract e.g. over the 2-year fixed term contract	<ul style="list-style-type: none"> The GH period start and end date and Fixed Term Contract start and projected end date must be the same You do not need to tick the Annually reviewed box in the Job Offer Additional Information screen No GH refresh letter is required unless the fixed term contract is subsequently extended. This option and Over Period of Current FTC are similar. Please check with your HR partner if there is a preferred approach in your School/Department
Over Period of Current FTC Not in use	Minimum hours to be guaranteed for full duration of the current fixed term contract.	<ul style="list-style-type: none"> The GH period start and end date and Fixed Term Contract start and projected end date must be the same You do not need to tick the Annually reviewed box in the job offer Additional Information screen No GH refresh letter is required unless the fixed term contract was extended. This option and Over Period of Current GHC are similar. Please check with your HR partner if there is a preferred approach in your School/Department
Per Year Use this for contracts a year or longer	The minimum hours to be guaranteed for one GH Period.	<ul style="list-style-type: none"> This option is recommended for individuals getting a contract for a number of years. The GH period is a year from the GH Start date. i.e. if start date is 01/09/2023 the GH end date must be 31/8/2024 The GH employee will only get access to a timecard to claim payment if they have a current GH period You do need to tick the Annually Reviewed box in the job offer Additional Information screen You need to send a GH refresh letter at the end of each GH period
Per Year, Every Year for (use with open ended contracts)	The minimum hours to be guaranteed are to be the same minimum hours for each GH Period, indefinitely	<ul style="list-style-type: none"> This option is usually used for open-ended assignments. By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum hours each year from the duration of the open-

Not in use		<p>ended contract. This may be an issue if the demand for the work or budget available changes over time.</p> <ul style="list-style-type: none"> You do not need to tick the Annually reviewed box in the job offer Additional Information screen There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee.
<p>Per Year/Every Year-Over Dura/FTC</p> <p>Not in use</p>	<p>The minimum hours to be guaranteed are to be the same for each GH Period for the full duration of the fixed term employment contract related to that assignment.</p>	<ul style="list-style-type: none"> Use this if you have a stable requirement for hours. By selecting this option, from the outset of the contract, you are guaranteeing the employee the same minimum hours each year from the duration of the fixed term contract. This may be an issue if the demand for the work or budget available changes over time. You do not need to tick the Annually reviewed box in the job offer Additional Information screen There is no need to send a GH refresh letter, but you should monitor the actual number of hours worked versus the minimum guarantee. No refresh letter is required unless the fixed term contract is extended.

Appendix C – HR Phase and State

When a candidate has been moved to HR after offer accepted they are sitting in the 'HR Phase' of the process. There are a number of states, below highlights these and a short description.

State	Description
Pending Manual Processing	Job offers in this state are awaiting HR Operations to process them. This usually includes

	internal candidates who have been moved to the HR phase, and possibly any external candidates who need manual reprocessing. Any error messages displayed should be resolved by HR Operations.
Pending Automated Processing	A temporary state that candidates do not typically stay in for long as they move automatically to either Pending Manual Processing (internal candidate) or Processing in Progress (external candidate). If any errors are identified at this state they are moved to the Error during processing instead. If HR Operations needs to move a given candidate out of the state Pending Automated Processing more quickly than the configured frequency, they can use the Process Now action.
Error During Processing	When a job offer encounters a mismatch or problem in its automated processing, the offer goes into this state (as outlined above). HR Operations will review and may require to work with the school or department to resolve this.
Processing in Progress	<p>This is the state where all candidates go as they move successfully forward through the hire process.</p> <ul style="list-style-type: none"> • For an external candidate, it means that a pending worker has been created based on that offer. • For an internal candidate, it means that HR Operations carried out the appropriate action which will create the new assignment. <p>Once the candidate reaches their start date, the system will automatically process the new assignment or convert the Pending Worker to employee. No action is required at this stage.</p>
Processed	This is the final state where all successful candidates end up after the pending worker record has been converted to an employee with an assignment, or when the internal candidate's assignment has been created.

Version History

Version	Date	Description	Approved By
N/A	September 2025	Pre-Redwood format	N/A
1.0	15/12/25	<ul style="list-style-type: none">Transferred guide to new templateReplaced all screenshots to reflect the new look of the Redwood screens	SK/ME

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.