THE UNIVERSITY of EDINBURGH

System User Guide

Hiring Manager & School/Department Administrator (SDA) - How to Schedule and Manage Candidate Managed Interviews System User Guide

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk.

Contents

Introduction

This guide covers key tasks for **Hiring Managers** and **SDAs** in '**How to Schedule and Manage Candidate Managed Interviews**' system process. It is related to the Process User Guide for Recruitment and Onboarding which is linked below.

[Guide to Recruitment and Onboarding](#)

Hiring Managers will access their requisitions via **My Team**, School/Department Administrators and will access requisitions via **My Client Groups**.

All interviews must be created from the template in People and Money. The benefit of this is that standard information can be populated for all interviewees before the schedule is created or individual invites are sent.

There are two types of interviews:

- **Hiring Team Managed** (where a specific interview time and date is sent).
- **Candidate Managed** (candidates choose a time from interview slots that have been set up).

Each interview type has different templates for the following interview formats:

- In Person
- Phone
- Web conference

This guide covers How to schedule and manage candidate led interviews. For details of how to set up Hiring Team Managed interviews please refer to the guide '[How to schedule and manage hiring team managed interviews](#)'.

Before scheduling interviews ensure the candidate's status (phase and state) matches the stage they have reached, for example: **Phase** (Interview) and **State** (1st interview to be scheduled).

It's suggested to set candidates to '1st Interview to be Scheduled' before arranging interviews and update to 'Interview Scheduled' once confirmed. More information on recruitment phases and states is available in the [Recruitment and Onboarding guide](#).

If the candidate cancels their interview and does not plan to reschedule, the state should be updated to '**Withdrawn by Candidate'.** Candidates can also withdraw applications themselves, hiring teams would receive a notification.

Once a candidate has been moved to the interview phase a report will be sent to the recruiter listed on the requisition via email to provide the reference details submitted upon application. This is currently limited to 2 references only and is sent the following day at 8am.

Create Interview Schedule → Add Timeslots → Invite Candidate(s) → Update Candidate Status
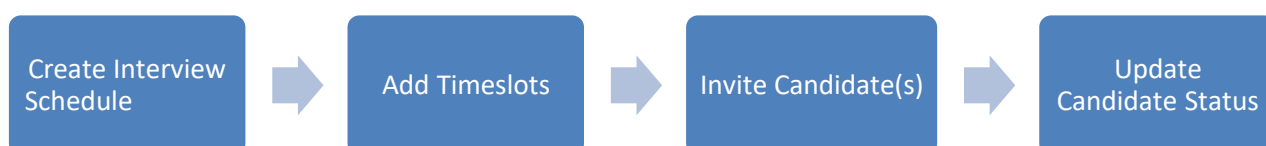
Quick Links to Detailed Steps

[Create an Interview Schedule](#)

[How to Add Timeslots to a candidate managed interview schedule](#)

[Candidate requests for additional interview slots](#)

[How to make changes to the interview schedule](#)

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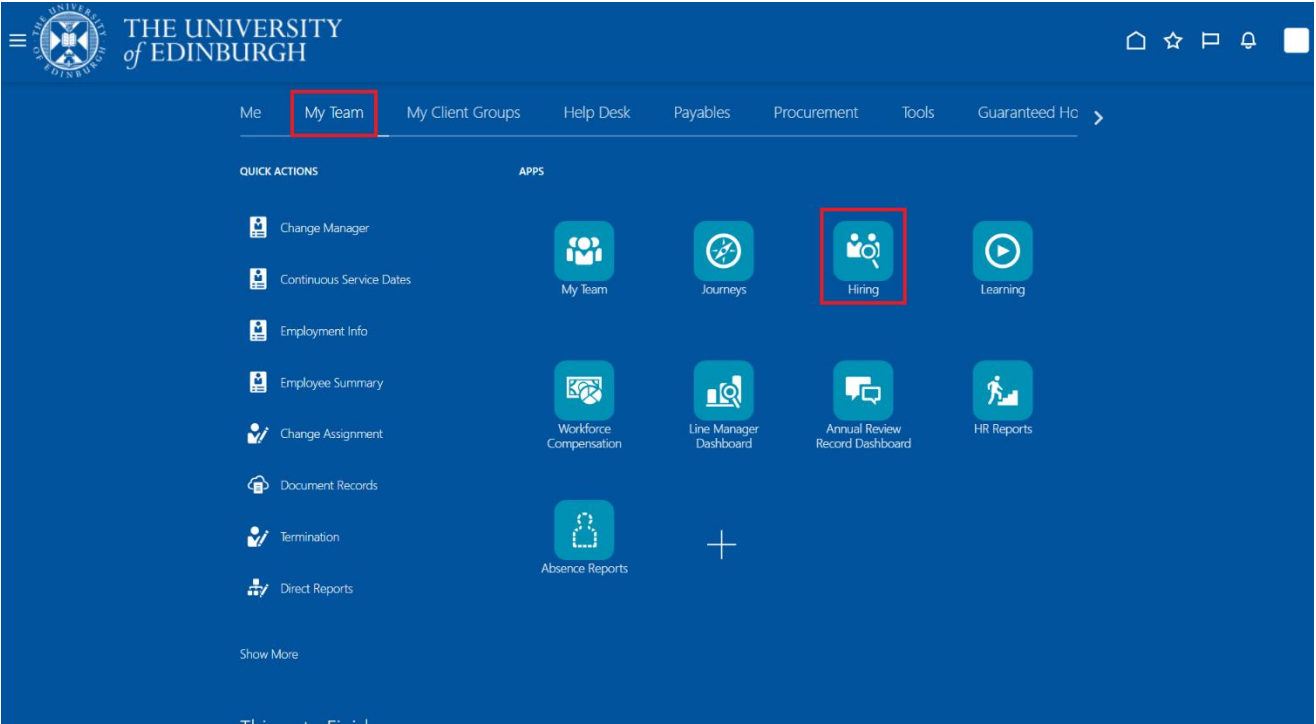
[How to update the candidate status](#)

[How to cancel an interview](#)

In Detail

This section provides the detailed steps and includes relevant screenshots from the system.
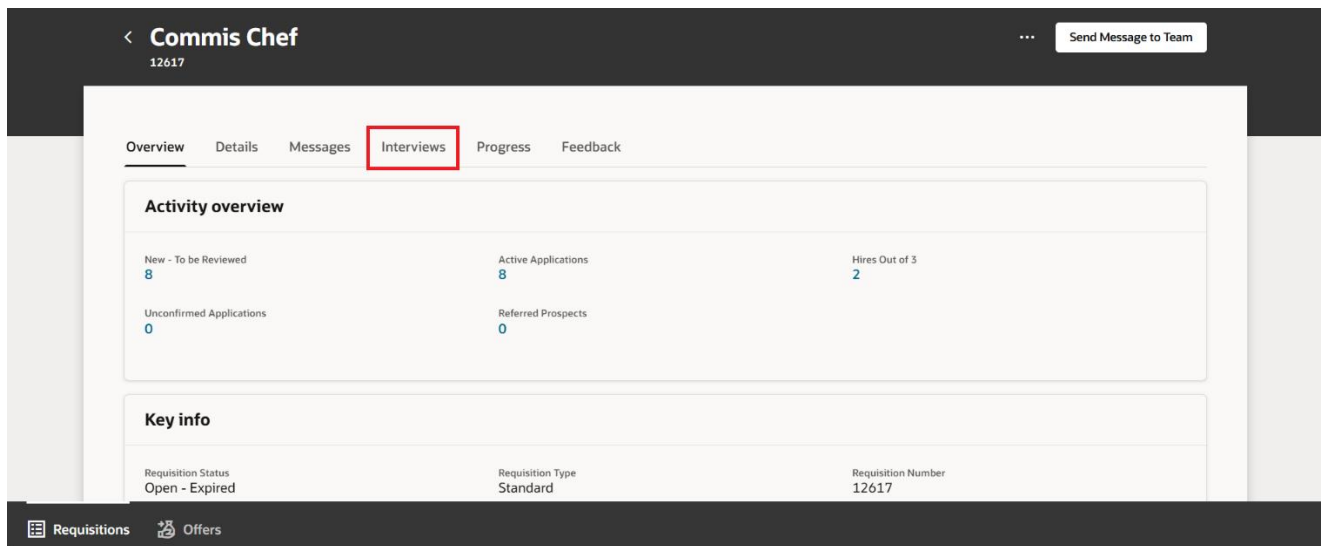
Create an Interview Schedule

1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.
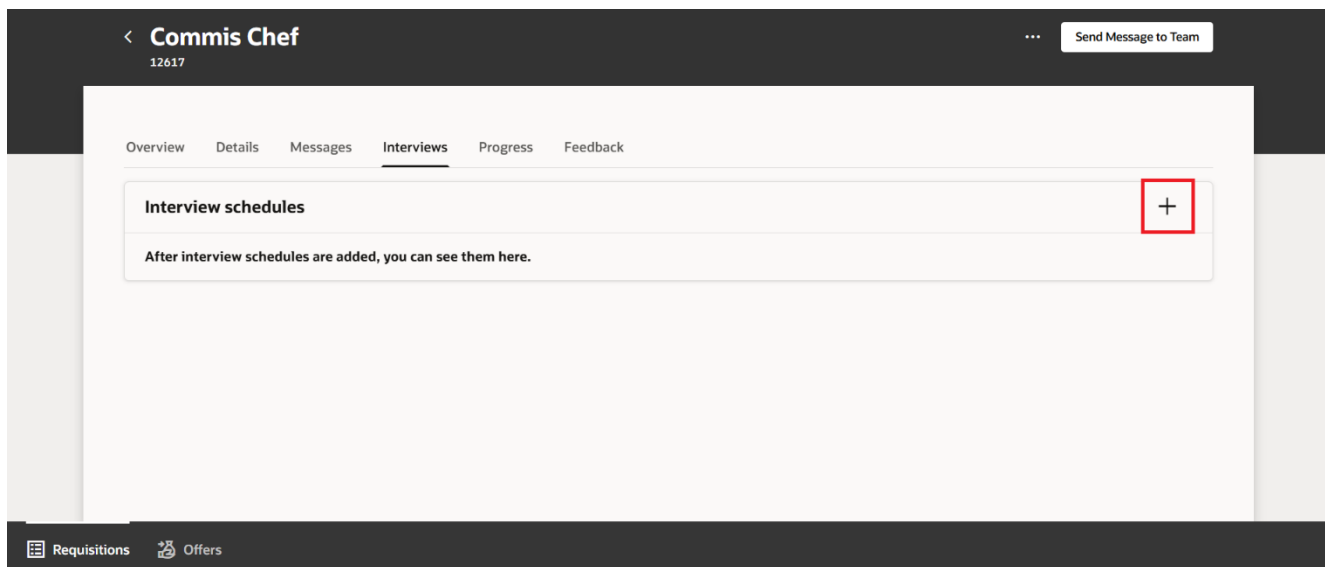

2. There are two tabs at the bottom of the screen: Requisitions and Offers. Ensure the **Requisitions** tab is selected and search for the job requisition using the requisition title, number or description. Click on the job requisition name to open it.
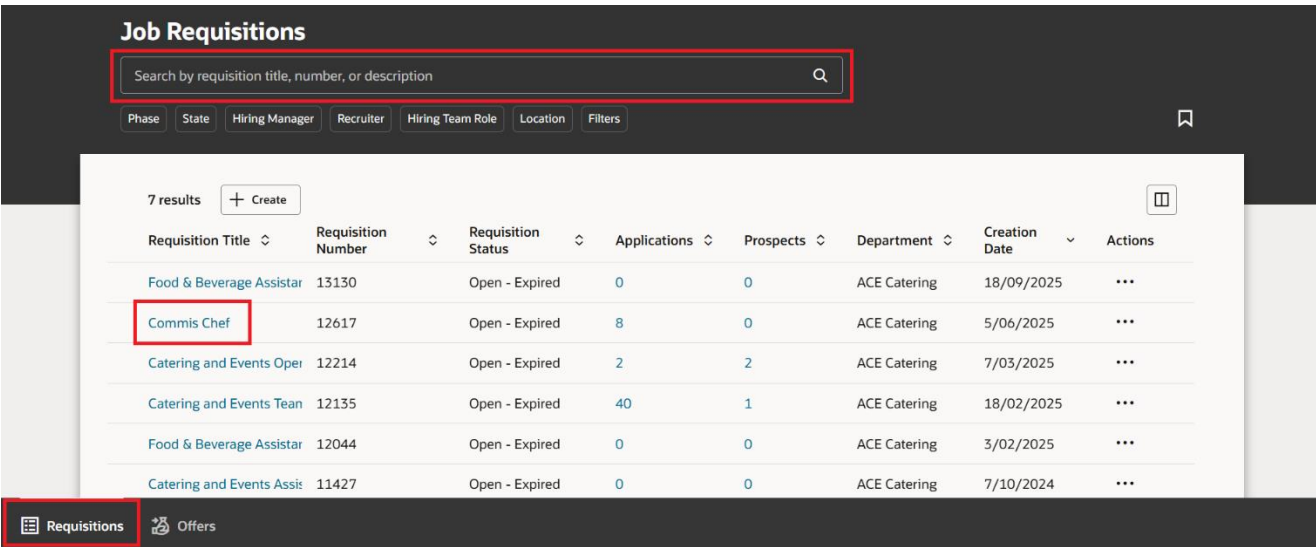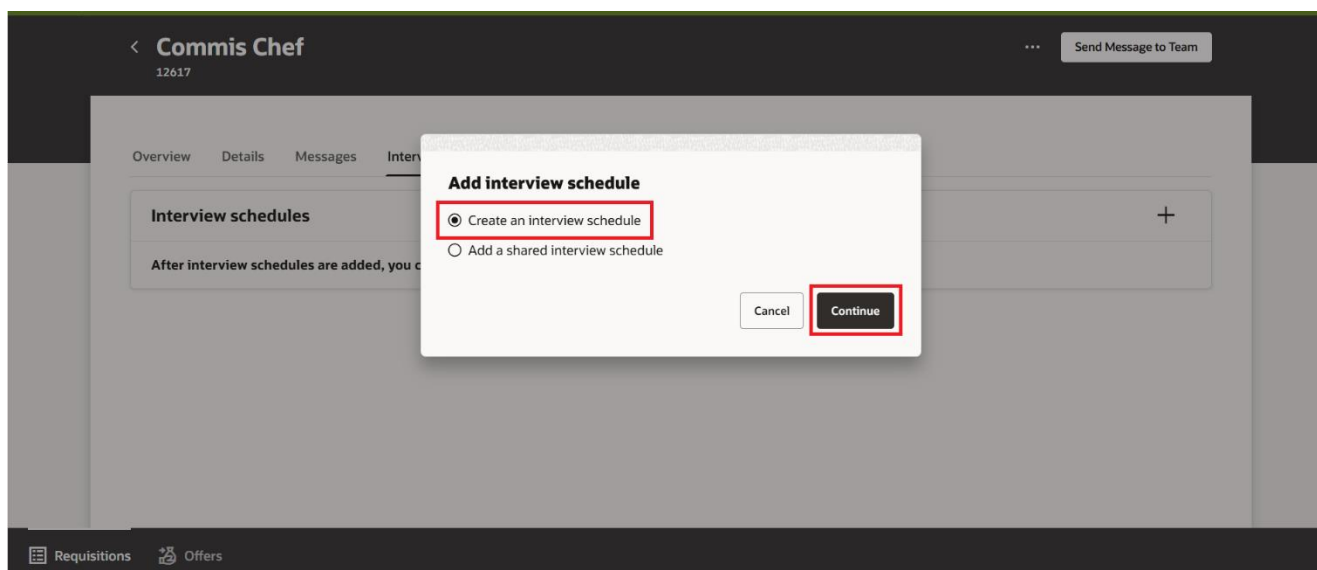

3. Click the **Interviews** tab.

4. Then, click on the **plus +** (Add) button to add an interview schedule.

5. An '**Add interview schedule**' pop up will appear. Ensure '**Create an interview schedule**' is selected and click on the **Continue** button.

In **Create Interview Schedule** screen, select the appropriate Candidate Managed interview schedule template.

Template	When to use
Candidate Managed Interview – Web conference	For interviews being conducted via Teams, zoom etc.
Candidate Managed Interview – In Person	For interviews being conducted on campus in person.
Candidate Managed Interview - Phone	For interviews being conducted over the telephone.

Confirmation will display on screen that the template details have copied to the schedule

6. The **Schedule Title** will auto-populate with the name of the template selected. Amend this to something more meaningful if you are setting multiple interview templates for the same requisition e.g. you may wish to add the date of the interview DD/MM/YY at the end. The **Schedule Owner** will default to the person creating the schedule (note blank below but will display a name) and is a required field, this can be amended here or later if required, then select **Continue.**

7. Add appropriate **Location Details.** Then click **Continue**.

For In-Person interviews you can enter an **Address** and any additional **Location Details** e.g. meeting room number or floor**.** To enter a university location, begin typing the building into the address field and select the option from the search options provided (see above).

For Phone interviews, a **phone** number and **extension** can be added.

For web conference interviews enter a **phone** number or **web conference link** and/or **access code** can be added.

8. Make changes to **Settings** as appropriate. Then click **Continue**.

a. Select/Deselect the checkboxes as appropriate. It would be recommended that you deselect **candidates can schedule on same day** to prevent same-day amendments to interviews.

b. Set the visibility of the interview schedule. If you select the **Candidates can see future interviews** checkbox, the **Interview Visibility** will set the length of time for which the schedule will be visible.

   IMPORTANT: The length of time selected here should cover the time between the interview being extended and the interview date e.g. if you have interviews in 3 weeks' time the interview visibility should be at least 3 weeks.

c. It is possible to limit the amount of times a candidate can reschedule an interview using the options here as needed

d. Select/Deselect the **Candidates can't make last minute changes** checkbox as required. If this is selected, the **Hours before interview** field can be used to select the length of time before the interviews that changes will be unable to be made.

9. Make changes to **Candidate** info, if needed. Then click **Continue**.

a. **Pre Schedule Section** – Enter any information to be sent to the candidate before they select their interview for example details of any pre work required before the interview e.g. prepare a presentation.

b. **Post-Schedule Details –** These are details you want to include in the interview email sent to all candidates. You can include extra info, like interview location directions, contact person on arrival, or web conference instructions. The text will be included in the interview invite email. An example of the interview invite template is included in the appendices for reference. Note

this will be sent once the candidate has confirmed their time and date for the interview. This is also visible to the candidate in the candidate profile in People and Money, go to Me **> Current Jobs > Submitted Applications**.

10. Make changes to **Interview Documents** if needed. Then click **Save and Close**.

Selecting **Include link to job posting** will send the hiring team a link to the published job board advert and job description details.

Selecting **Include link to resume** will include a link for collaborators to view the application details.

Selecting **Include link to .ics attachment** will allow the candidate to add the interview to an outlook calendar.

11. Reminders – select from the drop down if you want to remind hiring teams when few openings are left to book and specify the amount of openings, you can also choose to remind the hiring team when the schedule is full. **Then click Save and Close**.

How to Add Timeslots to a Candidate Managed Interview Schedule

1. The schedule will default to being **published**:

    a. To **unpublish Interview Schedule** click the **ellipsis** button and click **Unpublish Schedule**.
    b. To **delete a schedule**, first unpublish the schedule and then click the **ellipsis** button, you will now see an option to **delete schedule.**
    c. To **republish a schedule** that has been unpublished, click the **ellipsis** button and click the option to **publish schedule**.
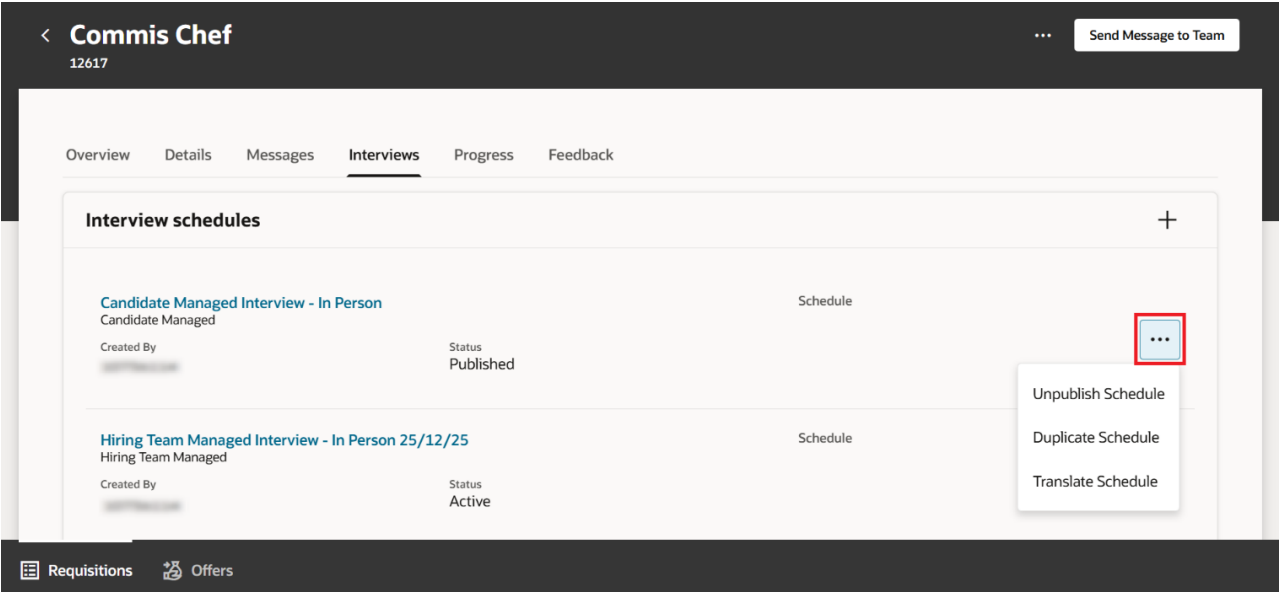
2. Ensure that the schedule is set to **Published**. To add interview slots, select the interview template link.
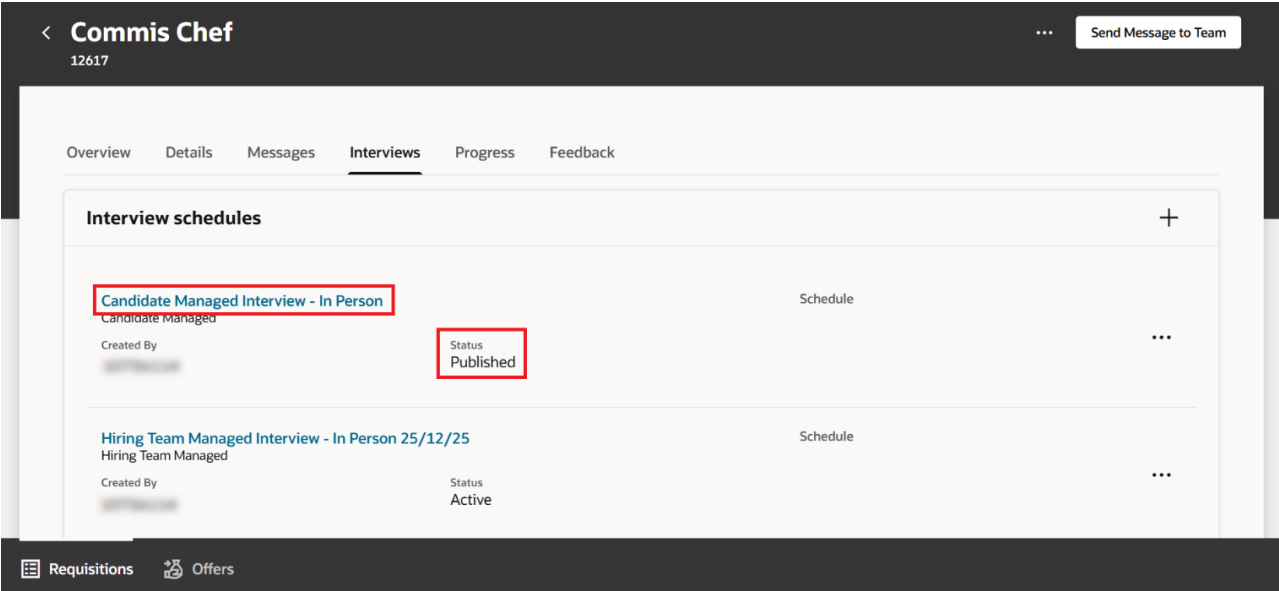
3. Click **Add** to create an interview slot.

4. Add the **interview dates** by selecting the calendar icon then selecting the interview date(s) from the calendar, you can select multiple dates if required.

5. Click away from the calendar to confirm your selection.

6. Add **Start Time** and **End Time** by selecting the appropriate icon, selecting the hour, minute and AM/PM sections. Note that this is the window of time in which candidates can book onto an interview slot (not the time of each individual interview slot).

   Enter Meeting Duration – i.e. the length of each interview.

   Enter the number of candidates – this is the number of candidates that can attend each interview slot.

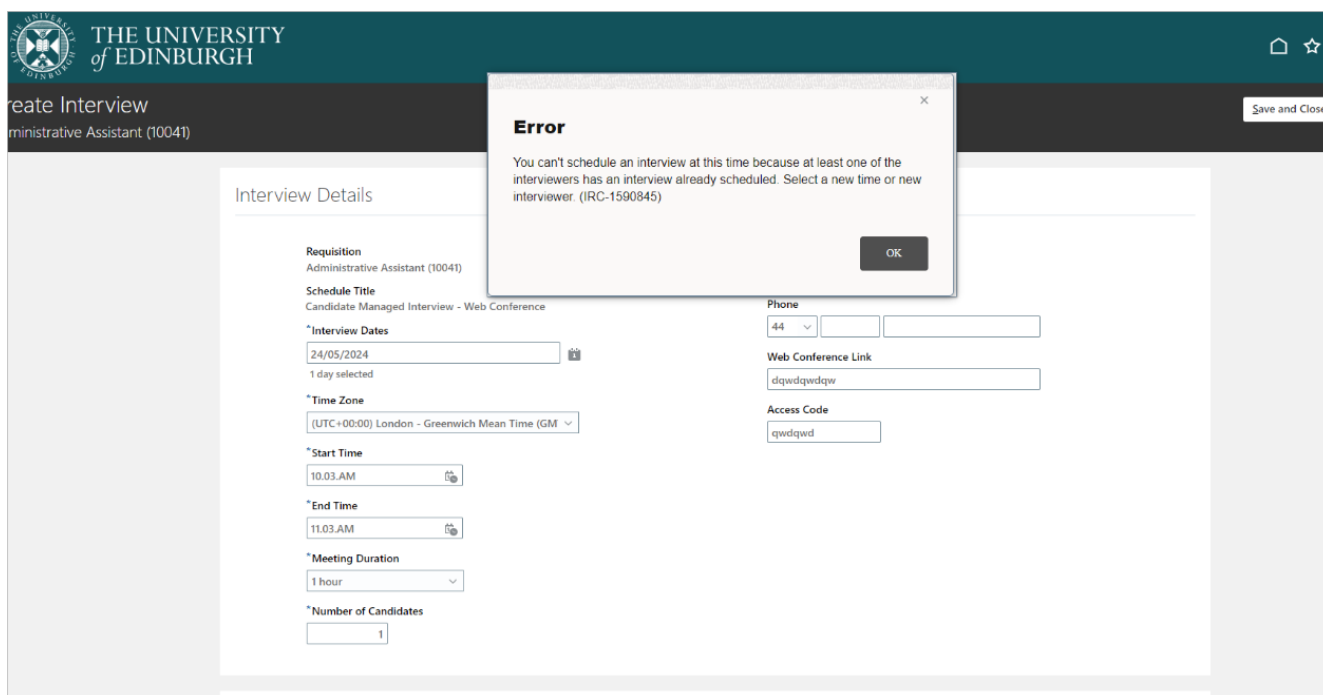**Note** the time zone defaults to GMT and will adjust to the local browser time the candidate is in. Then click **OK**.

7. Add **Interviewer Details** by typing the interviewer's full name into the field and selecting their name from the list which appears

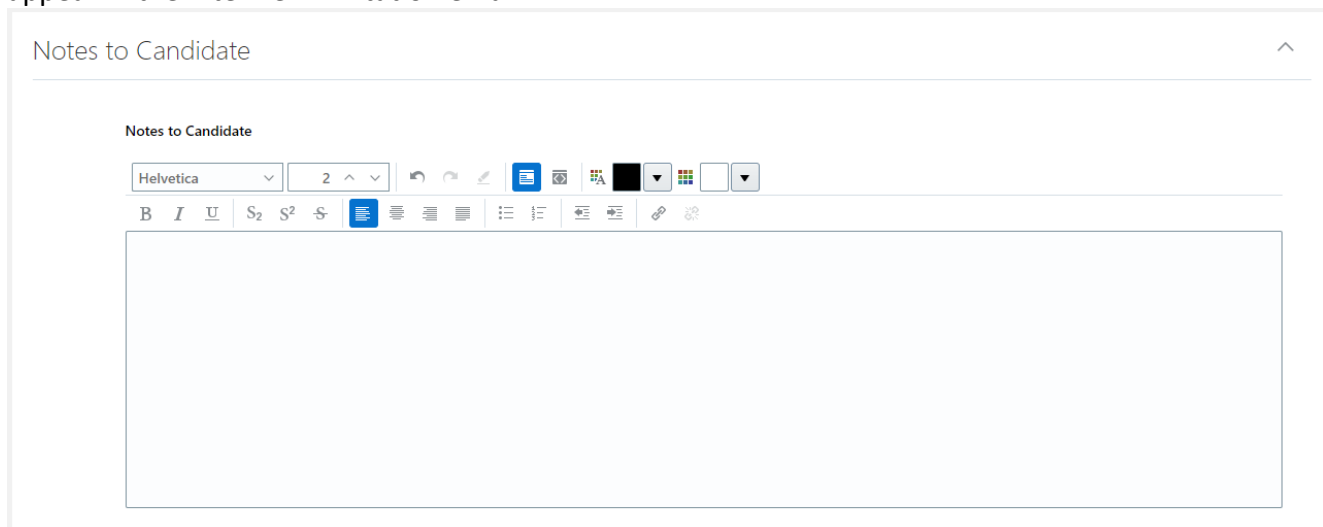Interviewers

Add Another Interviewer

8. Select the **Add Another Interviewer** link below and repeat the process if required.

   Note, if the interviewer already has an interview scheduled the system will display an error, you will need to select a new time or new interviewer.

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reate Interview
ministrative Assistant (10041)

Save and Close

Interview Details

Requisition
Administrative Assistant (10041)

Schedule Title
Candidate Managed Interview - Web Conference

Phone
44

*Interview Dates
24/05/2024
1 day selected

Web Conference Link
dqwdqwdqw

*Time Zone
(UTC+00:00) London - Greenwich Mean Time (GM

Access Code
qwdqwd

*Start Time
10.03.AM

*End Time
11.03.AM

*Meeting Duration
1 hour

*Number of Candidates
1

Error

You can't schedule an interview at this time because at least one of the interviewers has an interview already scheduled. Select a new time or new interviewer. (IRC-1590845)

OK

9. Add Notes to Candidate. Can be used to provide additional information to the candidate and will appear in the interview invitation email

Notes to Candidate

Notes to Candidate

Helvetica   2

B I U S₂ S² S

10. When all details are complete, select **Save and Close**.

11. Select the appropriate view from the left hand side of the screen to see the schedule created, you can choose from:

- Day View
- Week View
- Month View
- List View

## Candidate Requests for Additional Interview Slots

Please note: When candidates are asked to schedule an interview there is an option for them to request additional date/time slots. When candidates make a request the Hiring Manager and named recruiter will receive a notification that contains details of the request. An example of the notification is included in [Appendix G](#).

How to Make Changes to an Interview Schedule

1. To make changes to **Interview Schedule**, select the Interview Schedule link from the Interviews tab within the appropriate Job Requisition.
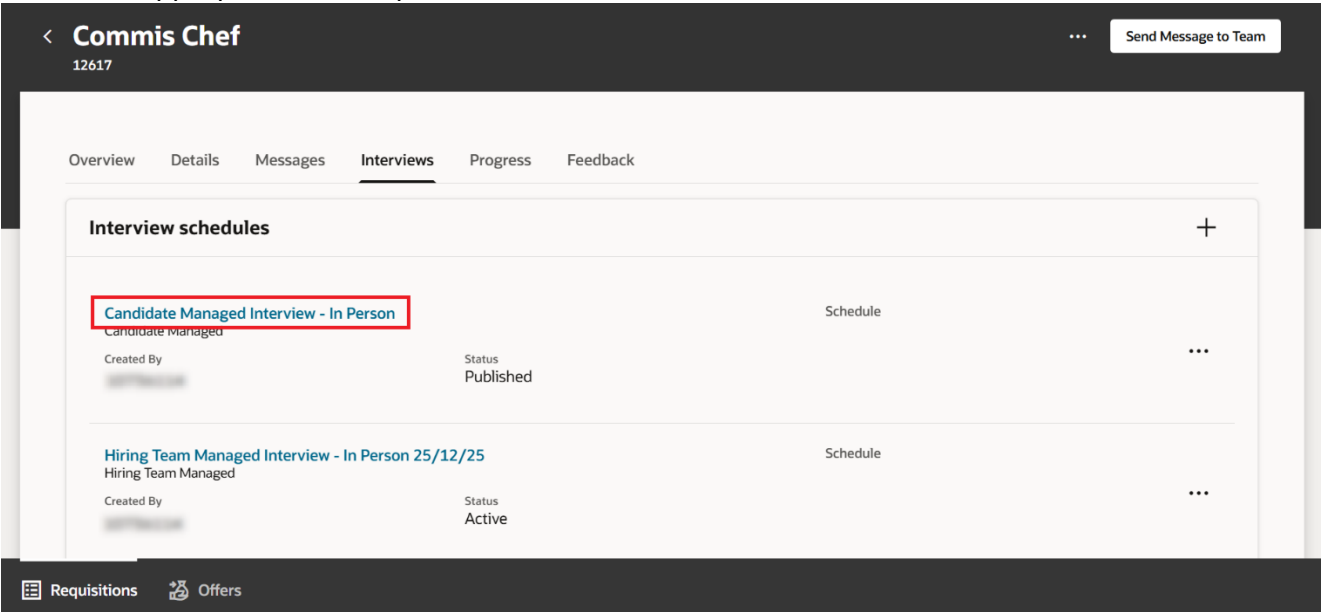
2. Locate the interview schedule in the calendar using the navigation provided.
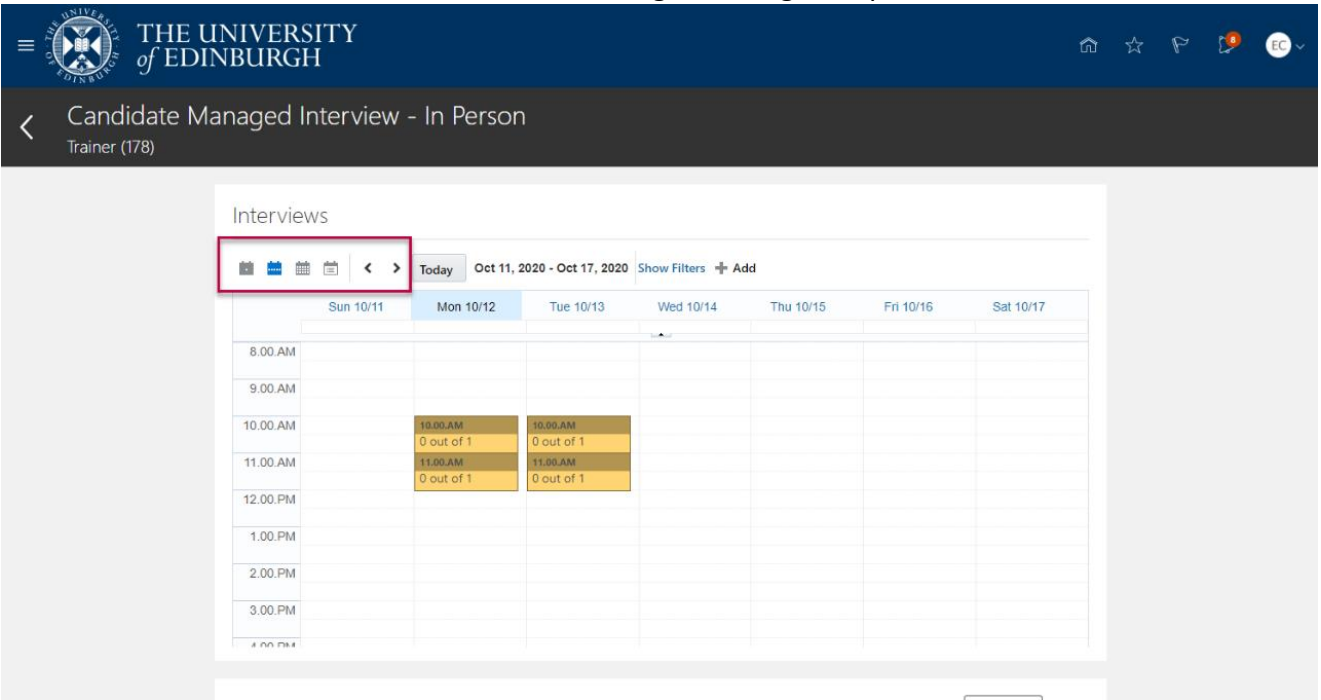
3. To make changes to an interview timeslot select the **calendar entry** then select **Edit**.

4. Make any required changes then select **Save**

An interview slot can be removed by selecting **Delete**, the candidate will receive an email to confirm the cancellation. Interviewers will also be notified.

Please **do not use** the 'respond' option on this screen.

5. Use the **return** icon to see the changes in calendar view

Interviews

Oct 11, 2020 - Oct 17, 2020   Show Filters   + Add   Today

	Sun 10/11	Mon 10/12	Tue 10/13	Wed 10/14	Thu 10/15	Fri 10/16	Sat 10/17
8.00.AM							
9.00.AM		9.00.AM 0 out of 1					
10.00.AM			10.00.AM 0 out of 1				
11.00.AM		11.00.AM 0 out of 1	11.00.AM 0 out of 1				
12.00.PM							
1.00.PM							
2.00.PM							
3.00.PM							
4.00.PM							

Basic Information   Edit

How to Invite a Candidate to an Interview

1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.
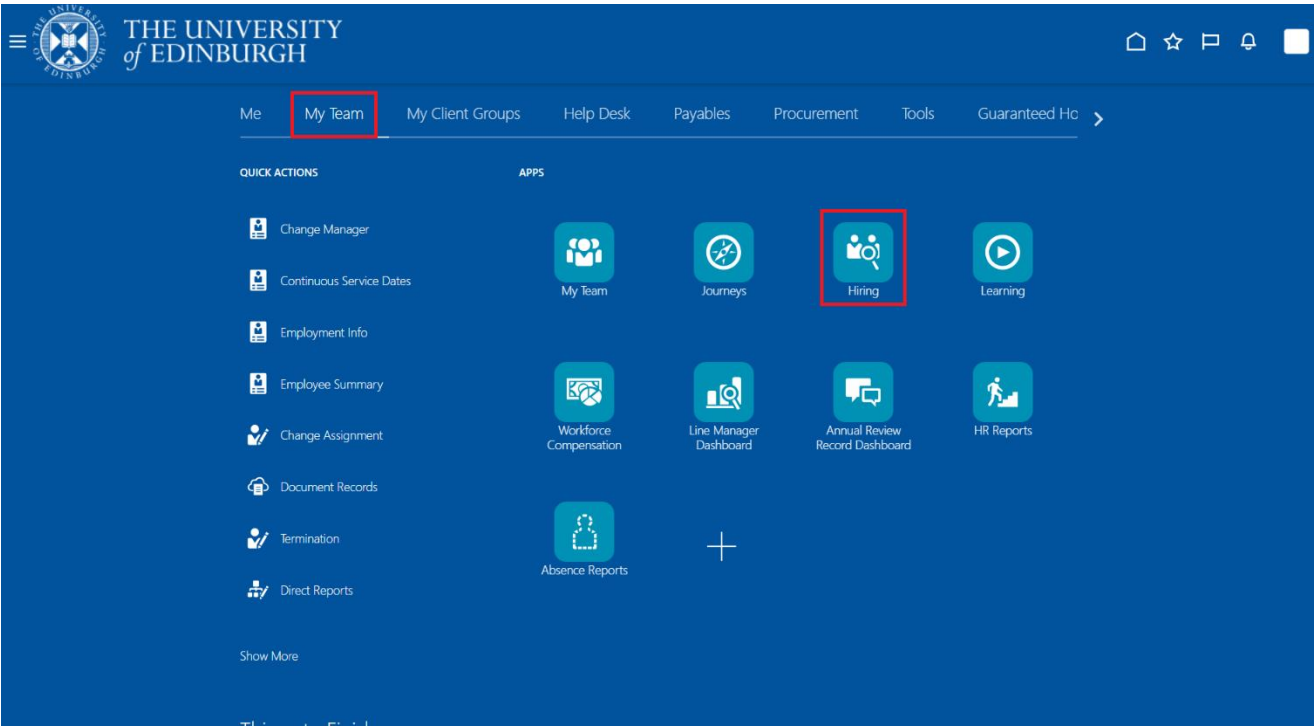
2. There are two tabs at the bottom of the screen: Requisitions and Offers. Ensure the **Requisitions** tab is selected and search for the job requisition using the requisition title, number or description. Click on the **number of applications** for the correct job requisition.

4. Select the candidates you want to invite to interview and click on the **More Actions** button.

5. Then select **Send Interview Invite**.
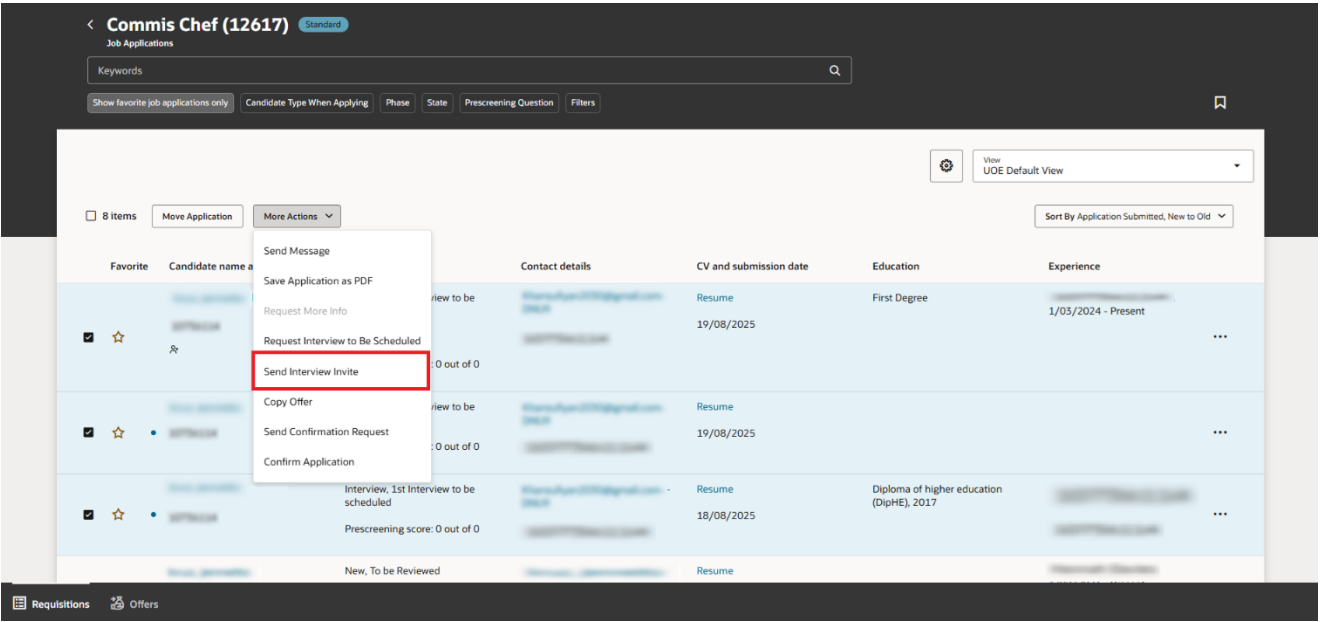
7. Tick **Candidate Managed** then click **Save and Close**.

8. Remember to update the candidate's status to **1ˢᵗ Interview Scheduled**.

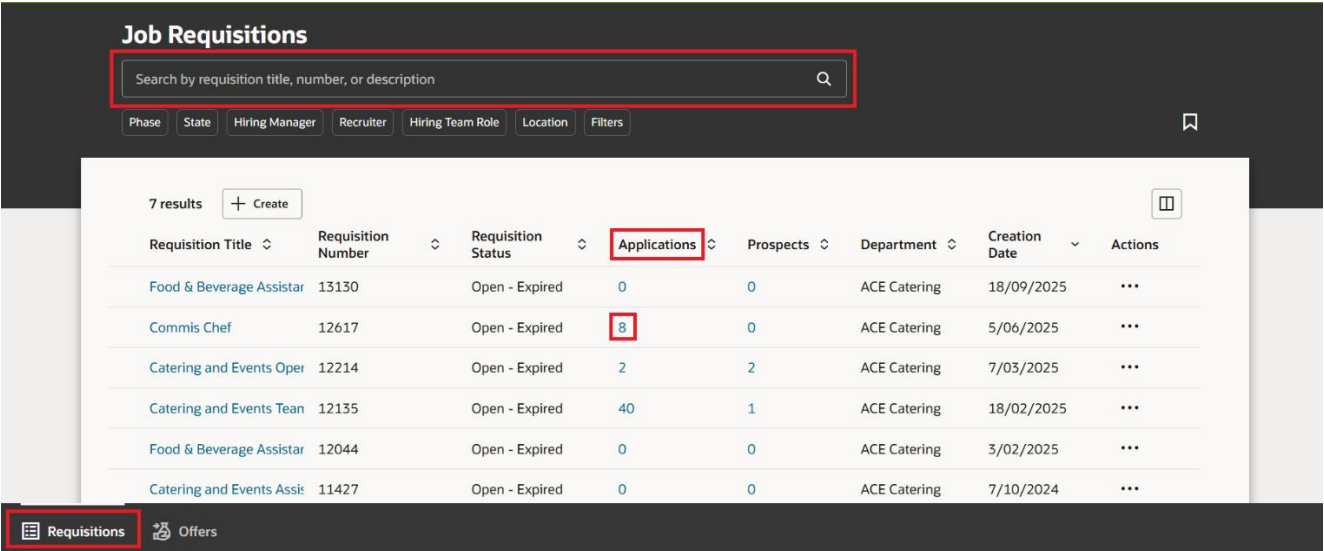   An example of the interview information sent candidates and the interview team are in the appendices for reference.
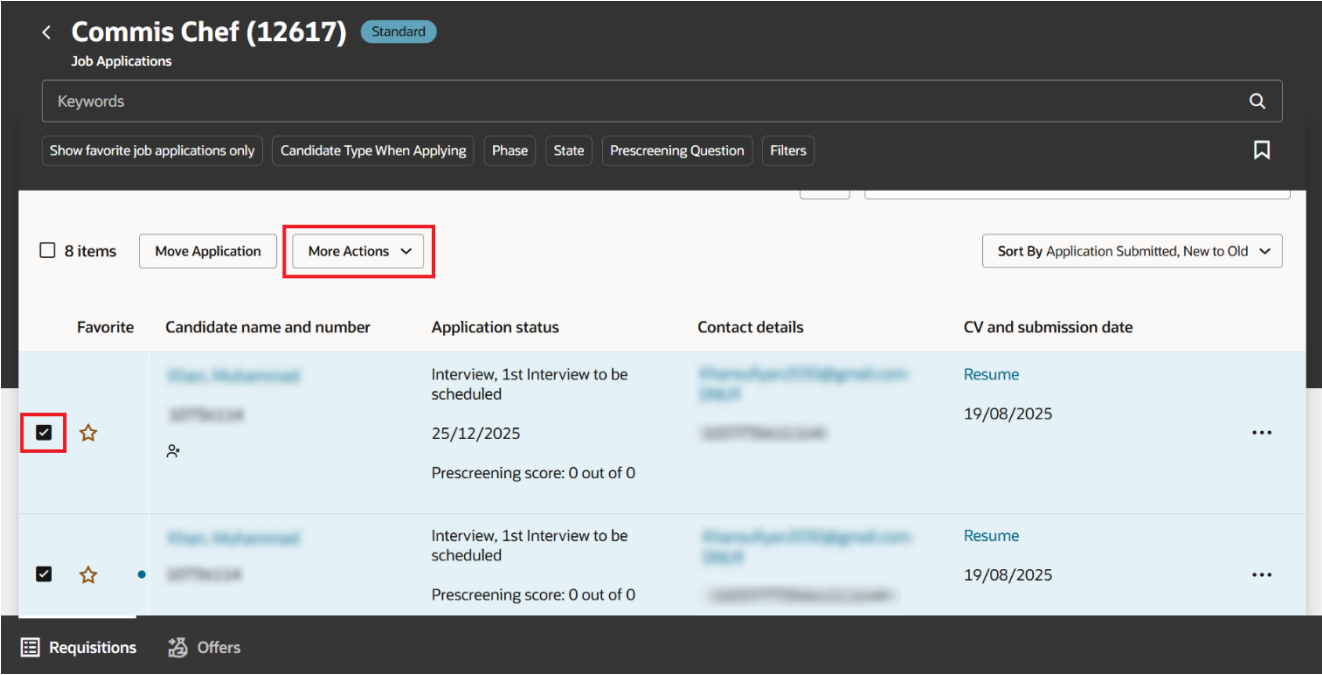
How to Update the Candidate Status

1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.
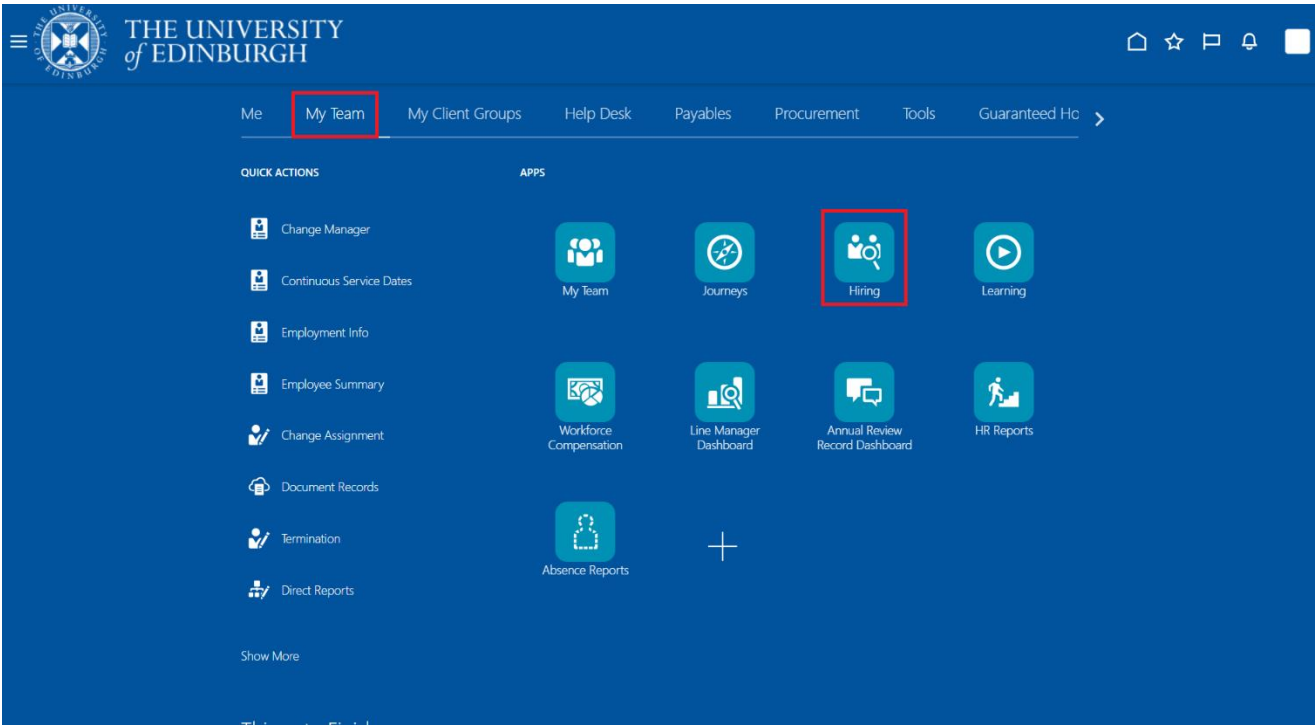

2. There are two tabs at the bottom of the screen: Requisitions and Offers. Ensure the **Requisitions** tab is selected and search for the job requisition using the requisition title, number or description. Click on the **number of Applications**.
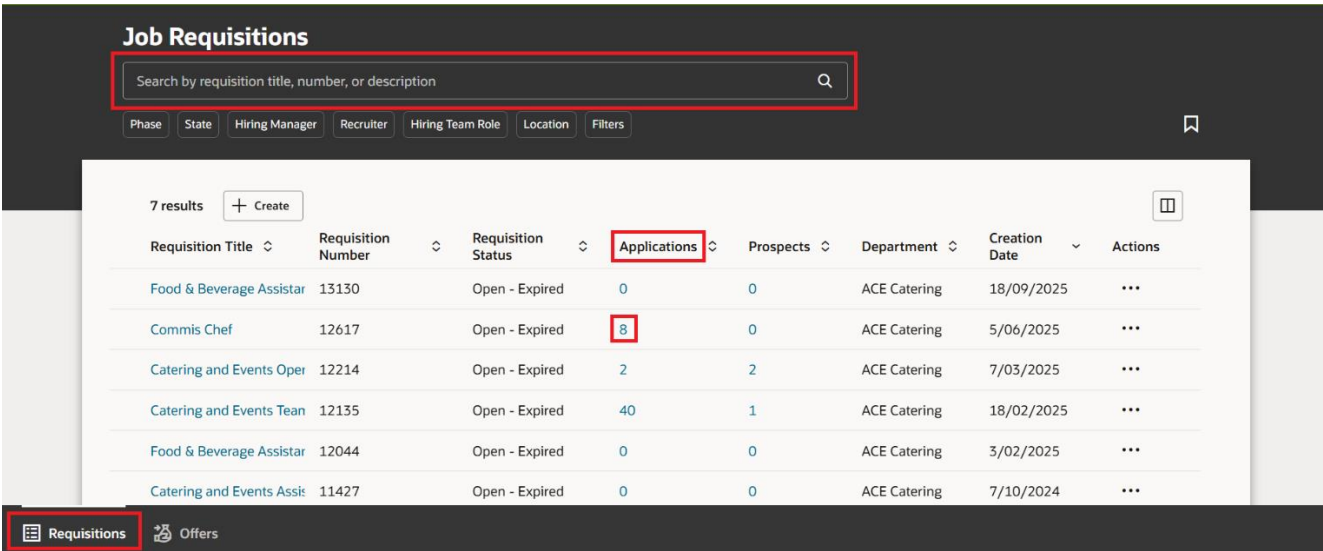
3. From the **job applications** screen select the **checkbox** next to the candidates' name, click on the **Move Application** button.
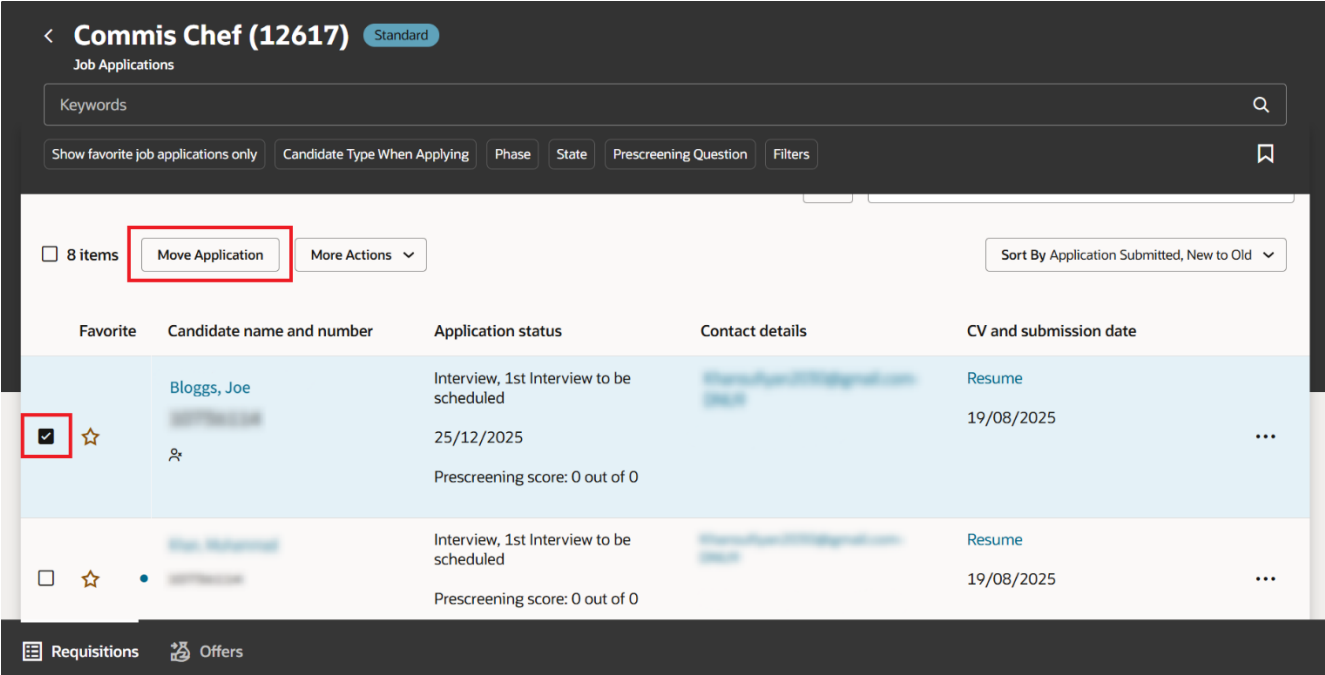
4. Use the **Phase** dropdown to select **Interview**.
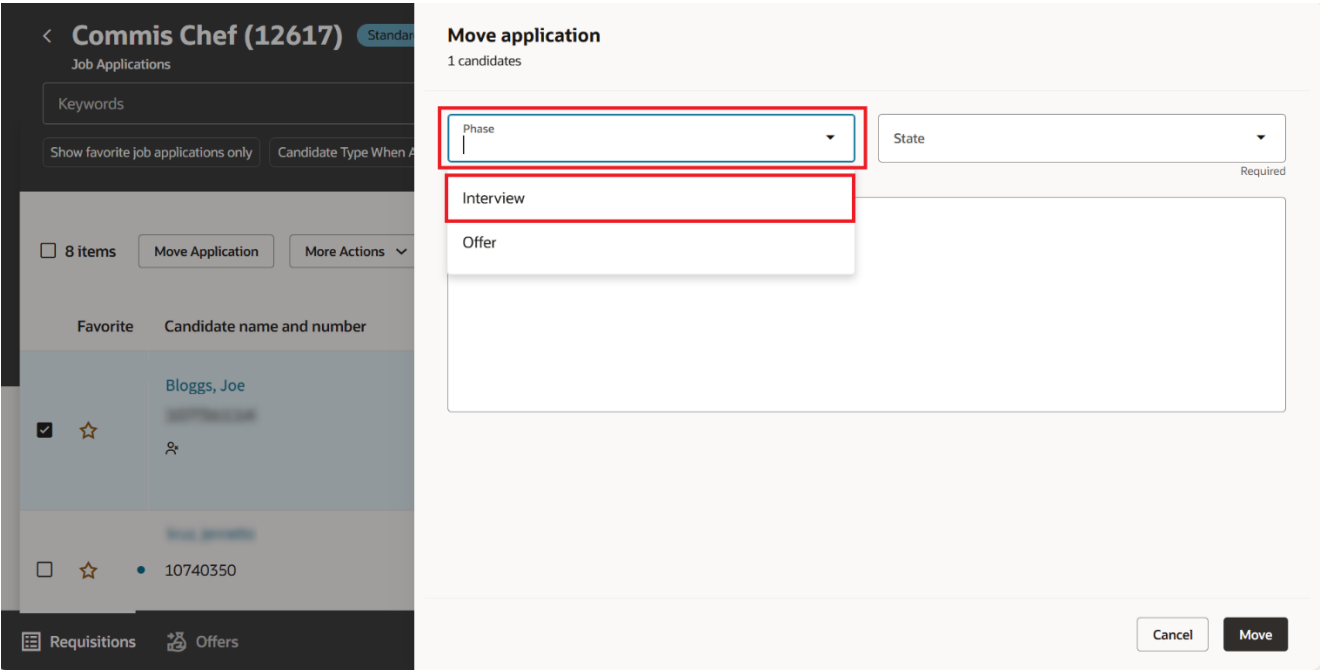
6. Then use the **State** dropdown to select **1st Interview Scheduled** then click the **Move** button.

7. If the candidate cancels an interview and does not plan to reschedule, ensure you update the state to **Withdrawn by Candidate**.

How to Cancel an Interview

1. In the **Requisitions** tab, search for the job requisition using the requisition title, number or description. Click on the job requisition name to open it.
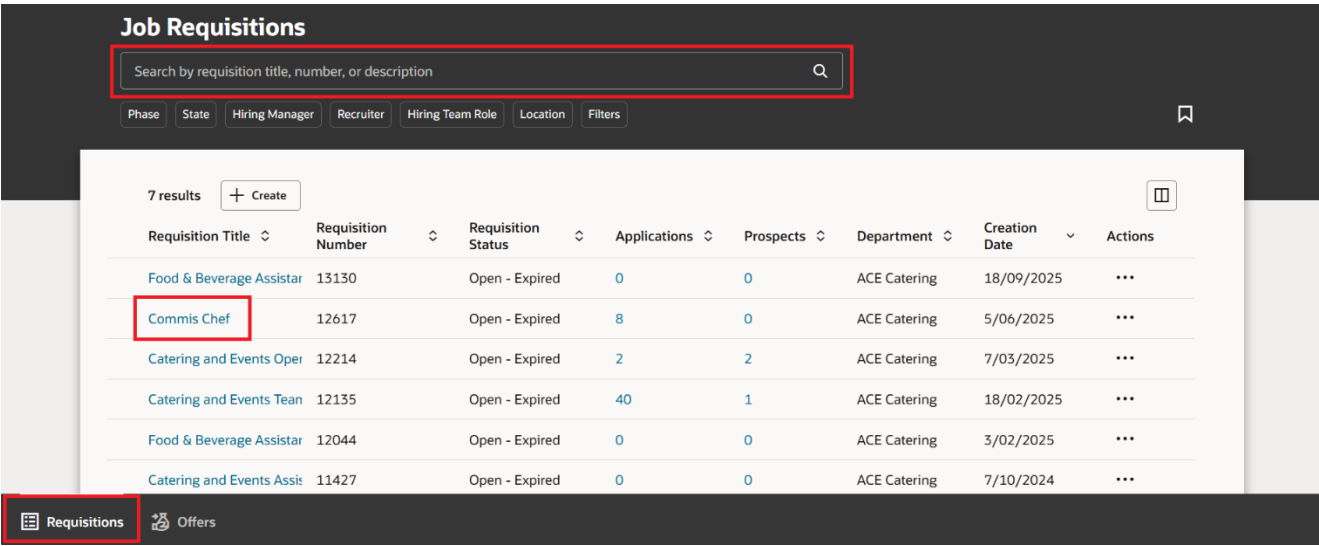
2. Click the **Interviews** tab.
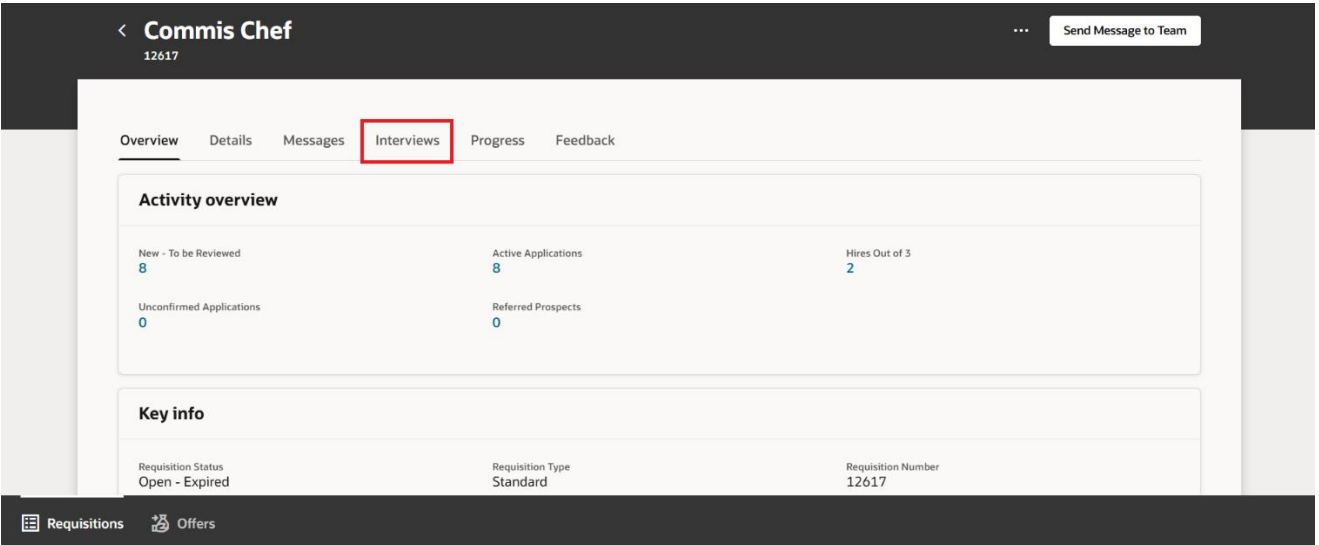
3. Select the title for the appropriate schedule you want to cancel an interview for.
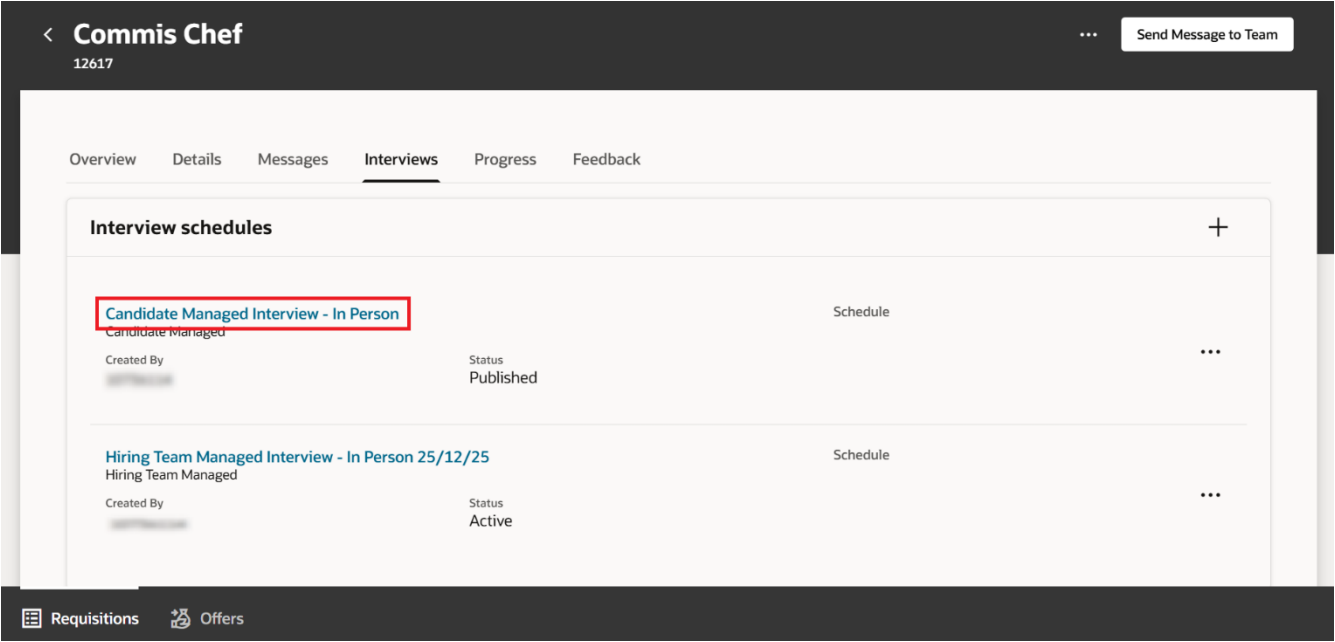
4. For ease, click the **List View** icon to show a list of all interview slots that have been created. The overview will show you how many of the slots have had interviews scheduled.
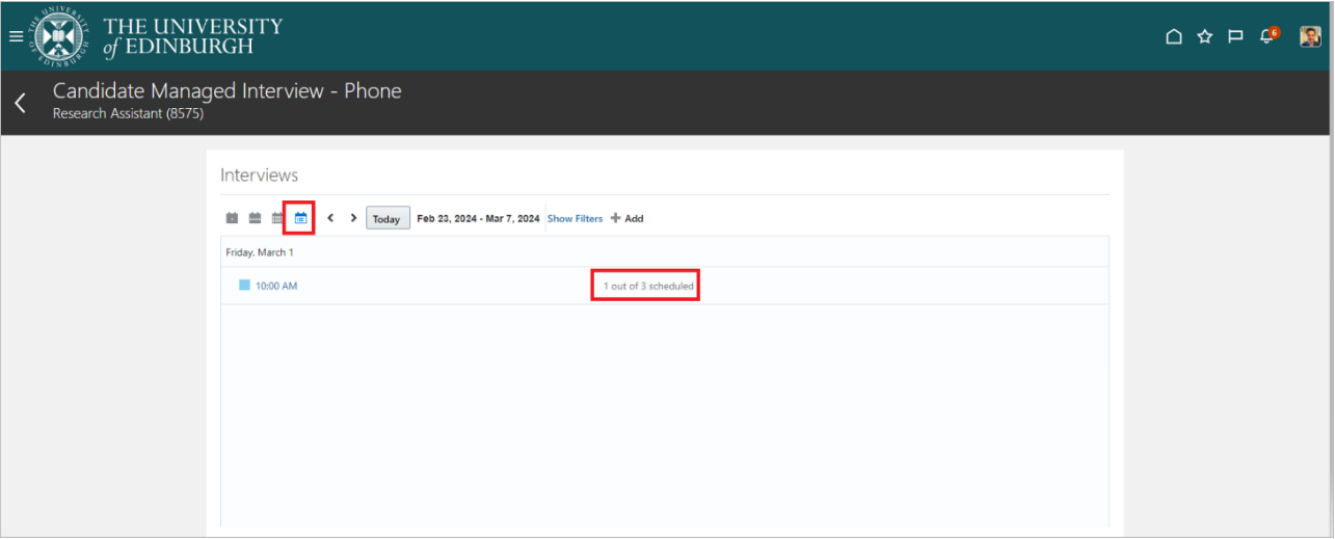
5. If candidates have scheduled an interview, you can cancel the interview by clicking on the timeslot, this will then take you to the following screen where you can click **Cancel interview**

6. If there are no interviews scheduled for the time slot the "Cancel Interview" option will not appear. Instead, you should either edit the schedule or delete the schedule (see How to invite a Candidate to an Interview section).

The candidate and hiring team are notified that the interview is cancelled.

An example of the notification and email are included in the appendices.

Appendix

Appendix A – Example of email sent to the candidates to book an interview

Clicking the "Interview Calendar" takes them to the following screen where the available slots are displayed. The candidate is asked to enter a unique 6-digit code emailed to them prior to accessing this screen:

It is possible for candidates to request additional interview slots. They can do this by clicking the link under the available slots. The link will take them to the following screen:

×

Request additional interview slots

Tell us what you need *

Would it be possible to have an interview at 12PM on 1st March

SUBMIT REQUEST

Appendix B – Example showing the screen presented to candidates when they click the time slot they want to schedule
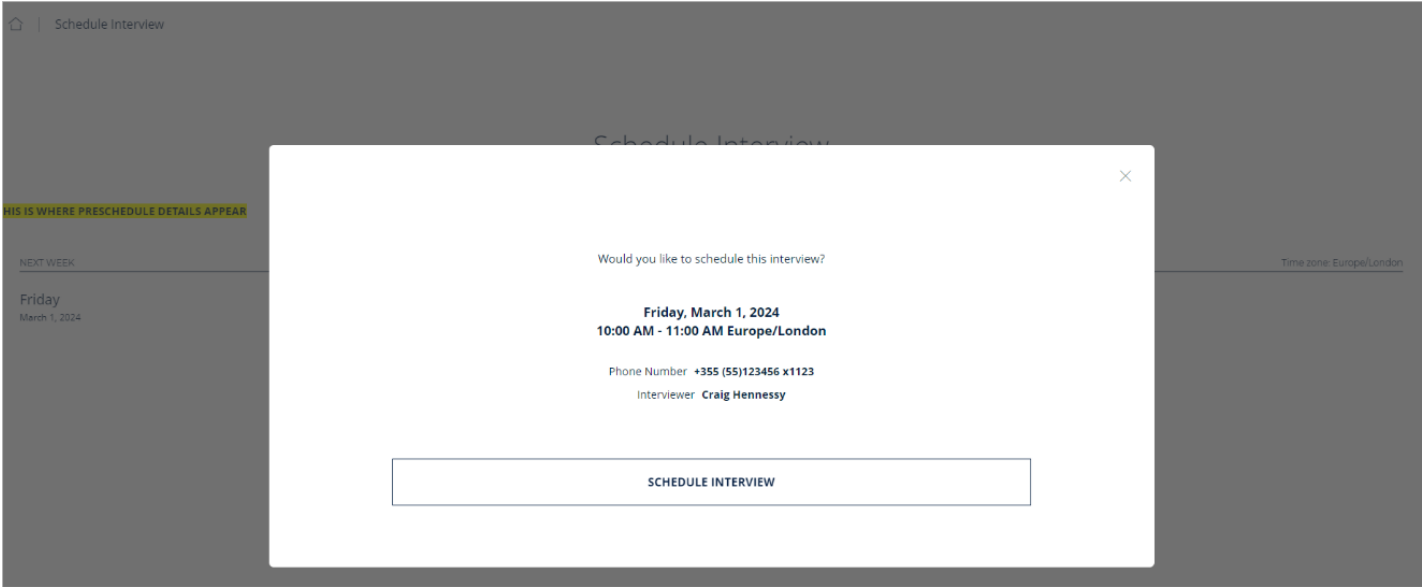
Once they click schedule interview, they get the following confirmation:
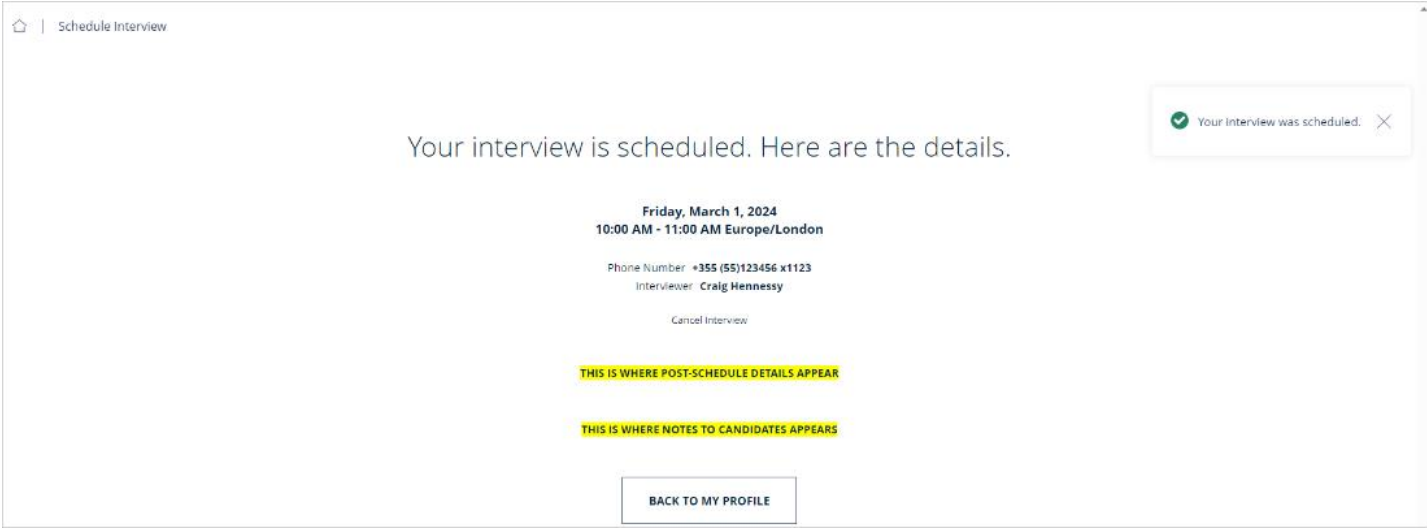
Candidates can see interview details at any time by going to their candidate profile on our career site and clicking "View details".
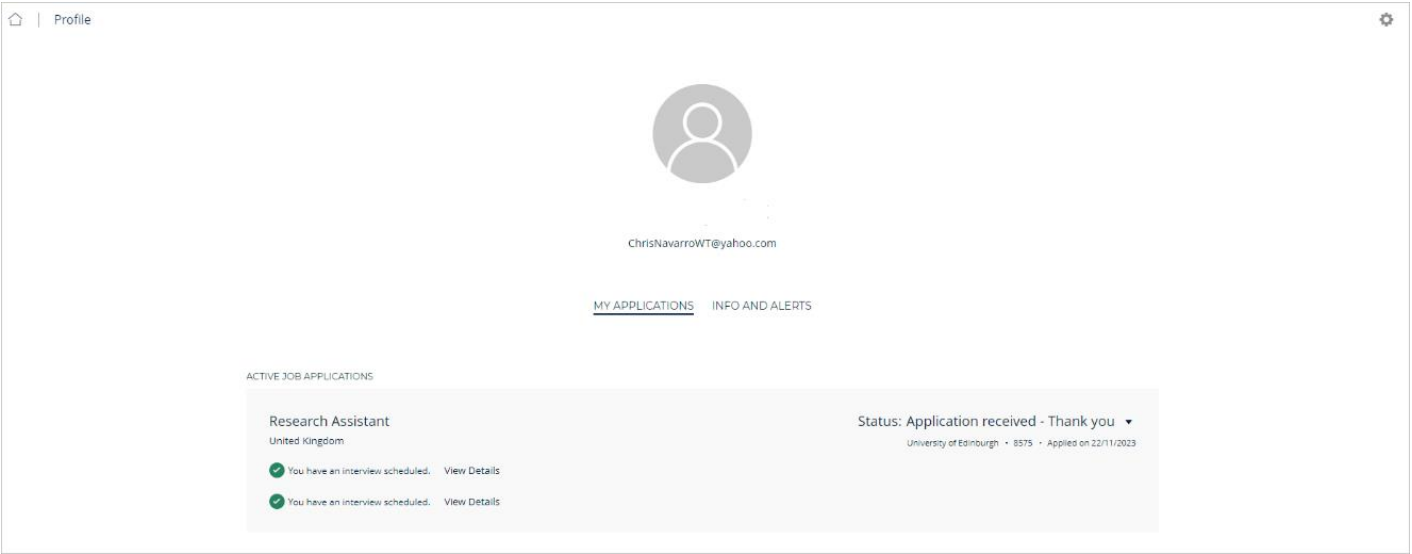
Appendix C – Example of interview confirmation email sent to candidates

THE UNIVERSITY of EDINBURGH

Help make the world a better place

Congratulations your interview has been scheduled!

Job Reference: 8575

Dear Candidate Name,

I am delighted to confirm we would like to invite you to interview. The details of your scheduled interview are as follows:

Date and Time: 1/03/2024 10.00.AM Europe/London
Requisition: Research Assistant
Interview Type: Phone
Interviewer(s): Craig Hennessy

Location: +355 (55)123456 x1123

THIS IS WHERE POST-SCHEDULE DETAILS APPEAR

THIS IS WHERE NOTES TO CANDIDATES APPEARS

Click to download a calendar attachment that you can add to your calendar.

Please note: Calendar links default to UTC time. When you save the event it will save it to your calendar in the time zone according to your local settings. The invite will however retain the UTC time unless you manually change this in your calendar.

Please confirm whether or not you are able to attend the interview by emailing RECRUITER NAME on pam.test.mailbox@ed.ac.uk.

Right to work and qualifications
In accordance with the Immigration, Asylum and Nationality Act 2006 and the Immigration Act 2016 we have a legal responsibility to prevent illegal working and therefore must check that all employees are entitled to work in the United Kingdom (UK). To meet this requirement we must see original document evidencing right to work in the UK before commencement of employment and this is normally carried out at Interview. This includes if you are already working with us as a contractor or agency worker.

Details of documents that provide evidence of a right to work can be found at:

https://www.ed.ac.uk/human-resources/demonstrating-rtw

If you are an existing employee you do not need to supply this information again at interview. If you are successful we will check your Right to Work status prior to sending an offer of employment. Please note you may be required to provide updated documentation at this point, for instance if you are on a time bound visa which is due to expire. Full details will be provided by HR prior to any offer being made.

If you do not have a pre-existing Right to Work in the UK or are at all unsure

please bring your passport with you.

Please can you also bring with you original documents for your highest qualification(s), and any other directly relevant qualifications for this position. We will take a copy of your documents and hold these should you be successful. For all unsuccessful applications we will securely dispose of all the copies taken.

Adjustments to assist your interview
If you require any assistance to take part in the selection process as outlined above (e.g. an accessible venue or signer), please let me know your requirements and we will make every effort to provide assistance.

Expenses
If you are travelling from outside Edinburgh to attend interview we will reimburse travel expenses, details of which are explained on the expense form. Please ensure you retain original receipts in order to make your claim.

I wish you every success at your interview and look forward to welcoming you.

Kind Regards,
RECRUITER NAME

This email is an automated notification, which is unable to receive replies.

You have control over your account: If you want to update your communication preferences, update personal details or delete your account you can do so within your profile. Visit https://www.ed.ac.uk/jobs

Appendix D – Examples of notifications that will appear in the bell icon for the Hiring Team

Notifications	Show All

● FYI	11 minutes ago
Interview schedule Candidate Managed Interview - Web Conference has few available openings	
	Dismiss

● FYI	11 minutes ago
An interview with ' for the job Research Assistant has been scheduled	
	Dismiss

● FYI	12 minutes ago
Interview schedule Candidate Managed Interview - Phone has few available openings	
	Dismiss

● FYI	12 minutes ago
An interview with ' for the job Research Assistant has been scheduled	
	Dismiss

Appendix E – Example of the interview scheduled notification

THE UNIVERSITY of EDINBURGH

Hello,

Here are the details of the interview that has been scheduled with Srishty Aku:

Date and Time: 2/03/2024 12.00.AM Europe/London
Requisition: Research Assistant - 8575
Interview type: Web Conference
Interviewer: Craig Hennessy

Location: weblink@interview.com Phone Number: +45 (44)1234123423 Access Code: 1234

Practical tips for interview preparation are available here
https://www.edweb.ed.ac.uk/human-resources/recruitment-guidance/candidate-selection

You can access the candidates CV on this link: CV Link
Access the job description by clicking on the following link: Job Requisition quick link
Once on the requisition page for this job, navigate to the details tab, open the Posting Description section, and click the provided link to view the complete job description.

Thank you.

Click the calendar link to download an attachment that you can add to your calendar.

Please note: Calendar links default to UTC time. When you save the event it will save it to your calendar in the time zone according to your local settings. The invite will however retain the UTC time unless you manually change this in your calendar.

Appendix F – Example showing interview cancelled notification (sent when Hiring Team cancel or the candidate cancels through their candidate profile)

Appendix G – Example of notification sent to Hiring Manager and Recruiter when a candidate has requested additional interview slots

Notifications   Show All

● FYI   1 hour ago

Action Required: Candidate Interview Slot Request for Research Assistant (8575)

[Dismiss]

Action Required: Candidate Interview Slot Request for Research Assistant (8575) - Work - Microsoft Edge   — □ ✕

🔒 https://elxw-dev8.fa.em3.oraclecloud.com/hcmUI/faces/adf.task-flow?tz=Europe%2FLondon&df=medium&dt=both&tf=short&lg=en&cy=&bpmWo... A⁕

[Dismiss]

The candidate, Fraser Brydon, has requested additional interview slots for the Research Assistant (8575) position.

Please review the candidate's request outlined below to see if you can accommodate their preferences or suggest alternative options.

Details of the candidate's request:

Can I please attend on 1st March at 11:30 instead

How to add slots:

1. Go to the job requisition in People and Money.
2. Click on the "Interviews" tab and select the candidate-managed schedule you created.
3. Click "+Add" to create new slots.

Once you've added the slots, inform the candidate about the updates by emailing them at fbrydon@ed.ac.uk-DNU. Alternatively, you can contact them through People and Money using the "Send Message" option in their candidate record.

Booking instructions for the candidate:

Candidates can book extra slots using the link in the original interview invitation or by logging into their candidate profile on the University of Edinburgh career site. In the "My Applications" section, they can schedule the interview at their convenience.

If you cannot accommodate the request:

If adding slots isn't possible, please inform the candidate promptly by emailing them at fbrydon@ed.ac.uk-DNU. Alternatively, you can contact them through People and Money using the "Send Message" option in their candidate record.

Thank you for your swift attention and consideration of this matter.

Version History

Version	Date	Description	Approved By
2.0	15 December 2025	- Updated guide to new format. - Updated screenshots and steps to reflect Redwood changes in P&M.	

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.