System User Guide

Hiring Manager & School/Department Administrator (SDA) – How to Schedule and Manage Hiring Team 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 Hiring Team 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 Hiring Team Managed Interviews. For details of how to set up a Candidate Managed interview please refer to the guide ['How to schedule and manage Candidate 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If the candidate cancels their interview and does not plan to reschedule, the state should be updated to '**Withdrawn by Candidate'.** Candidates can also withdraw applications themselves, hiring teams would receive a notification.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	→	Invite Candidate	→	Update Candidate Status
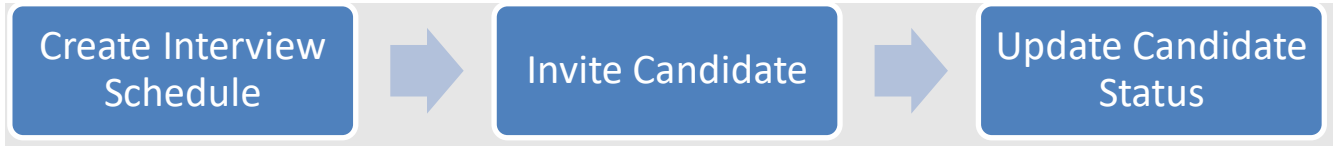
Quick Links to Detailed Steps

[Create an Interview Schedule](#)

[How to invite a candidate to an Interview](#)

[How to reschedule an interview](#)

[How to update the candidate status](#)

[How to cancel an interview](#)

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.

How to 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. In the **Requisitions** tab, search for the job requisition. 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.

6. In **Create Interview Schedule** screen, select the appropriate **Hiring Team Managed** interview schedule template.

7. 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, then select **Continue.**

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

9. Review and make changes to **Settings** as appropriate. Then click **Continue.**

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

11. Make changes to **Interviewer Documents** if needed. Then click **Save and Close**

## 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. In the **Requisitions** tab, search for the job requisition. Then, click on the number of applications for the correct job requisition.

3. Choose the candidate you want to invite to interview.

4. Select the **Interviews** tab, then click on the **plus +** (**Add**) button.

5. Choose the appropriate **Hiring Team-Managed Template (created in previous steps)** from the **Schedule Title** dropdown

6. Review the information pulled in from the schedule template and edit if required.

7. Add the **Start Date and Time** and **End Date and Time**.

8. Add **Interviewer Details** by typing the interviewer's full name into the field and selecting their name from the list which appears. Select the **Add Another Interviewer** link below and repeat the process if required.

9. Add any relevant **Notes to Candidate**.

10. Click **Save and Close** to send the invite to the candidate.

How to Reschedule 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. In the **Requisitions** tab, search for the job requisition. Then, click on the number of applications for the correct job requisition.

3. Choose the candidate you want to invite to interview.

4. Select the **Interviews** tab, then select the interview.

5. Click **Edit**.

6. Make any required changes, then click **Save,** at this point the candidate will be sent an email advising that their interview has been updated. Members of the Hiring Team will also receive a notification advising them of the update.

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. In the **Requisitions** tab, search for the job requisition. Then, click on the number of applications for the correct job requisition.

3. From the **job applications** screen select the **checkbox** next to the candidates' name and click on the **Move Application** button.

4. In the **Phase** dropdown, select **Interview**.

5. Then, in the **State** dropdown, select **1st Interview Scheduled** then click **Move**.

6. If the candidate cancels an interview and does not plan to reschedule, ensure you update the state to **Withdrawn by Candidate.** To do this, repeat steps 4 and 5 of this section, then in the **State** dropdown, select **Withdrawn by Candidate**. Click on the **Move** button to save the new status.

How to Cancel 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. In the **Requisitions** tab, search for the job requisition. Then, click on the number of applications for the correct job requisition.

3. Select the appropriate candidate.

4. Select the **Interviews** tab then click on the **Cancel Interview icon**. The candidate and hiring team are notified that the interview is cancelled.

In Detail

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

How to 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**.
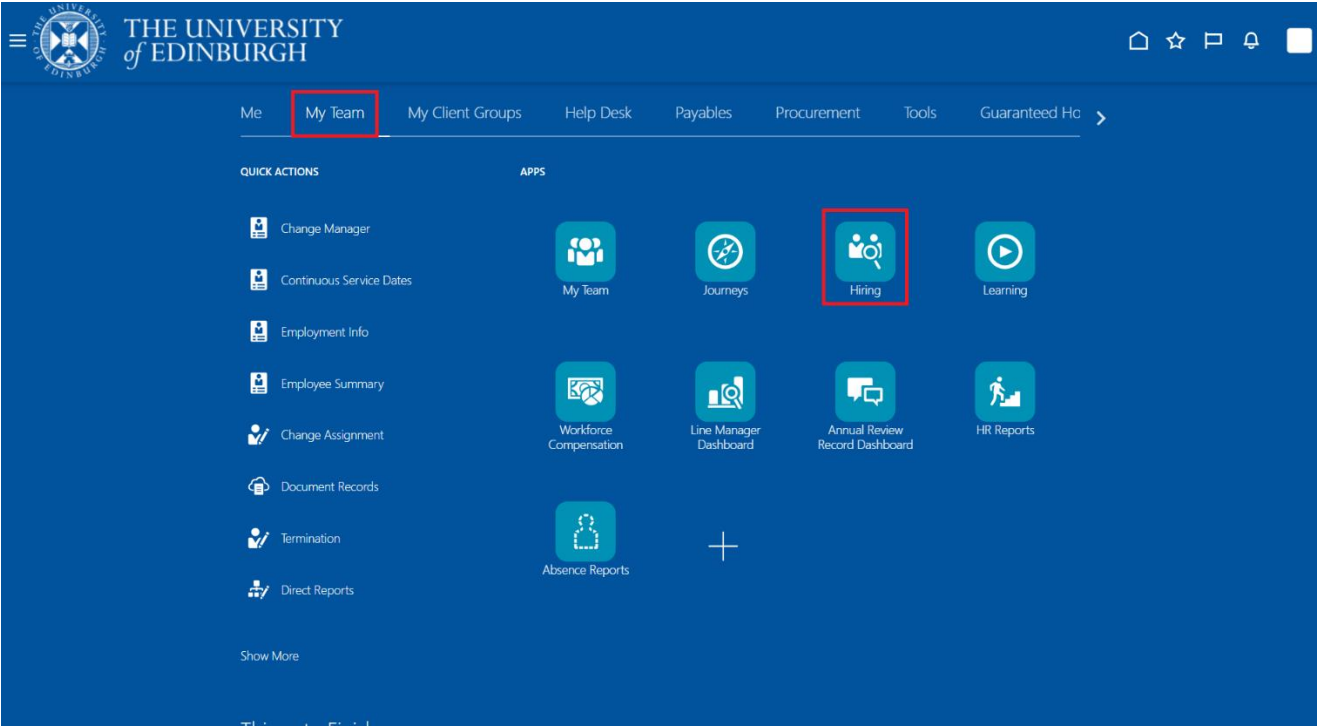
2. There are two tabs at the bottom of the page in the Hiring app: **Requisitions** and **Offers**.
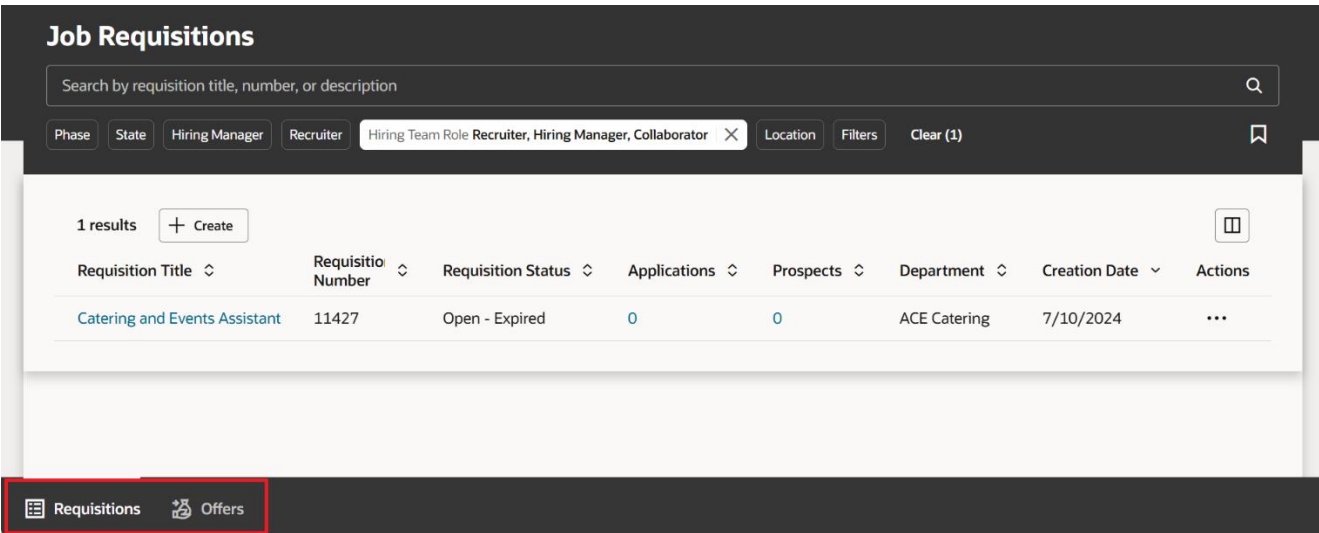
3. In the **Requisitions** tab, search for the job requisition using the requisition title, number or description. Click on the job requisition name to open it.

4. Click the **Interviews** tab.

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

6. An '**Add interview schedule**' pop up will appear. Ensure '**Create an interview schedule**' is selected and click on the **Continue** button.
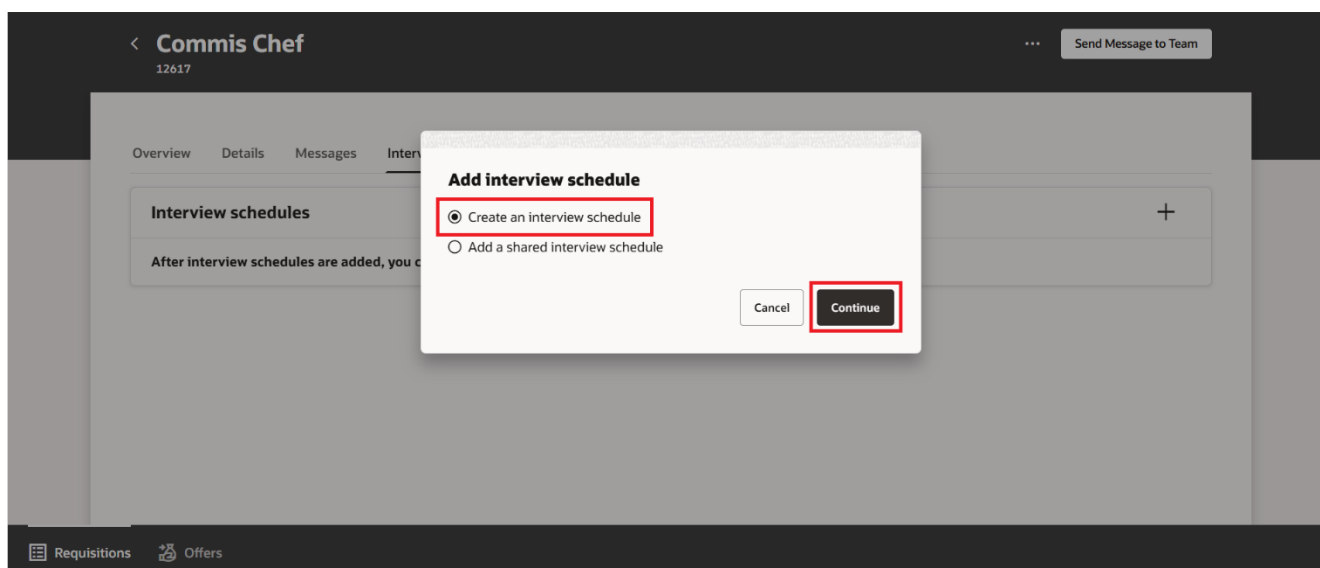
7. In **Create Interview Schedule** screen, select the appropriate **Hiring Team Managed** interview schedule template

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

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

8. 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, then select **Continue.**

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

10. Review and make changes to **Settings** as appropriate. Then click **Continue.**

a) Candidates can cancel – ensure this box is ticked

b) 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. (Options include 1 hour, 2 hours, 4 hours, 8 hours, 12 hours, 24 hours, 48 hours).

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

Post-Schedule Details: These are details you want to include in the interview email sent to all candidates. The interview email invitation (see appendices) asks the candidate to confirm whether they can attend the interview by emailing the recruiter. The invitation auto populates the name and contact email of the recruiter.

Once the candidate responds, the hiring team should update the candidate's status accordingly, for example "Interview – Accepted Invitation." This section can also be used to 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.

12. Make changes to **Interviewer Documents** if needed. Then click **Save and Close**

Selecting **Include link to job posting and/or include link to resume** will include a link to these documents in the notification sent to the hiring team to access these documents.

Selecting **include link to .ics attachment** will allow the hiring tram to add the interview to their outlook calendar. See [appendices](#) for an example of the notification.

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**.
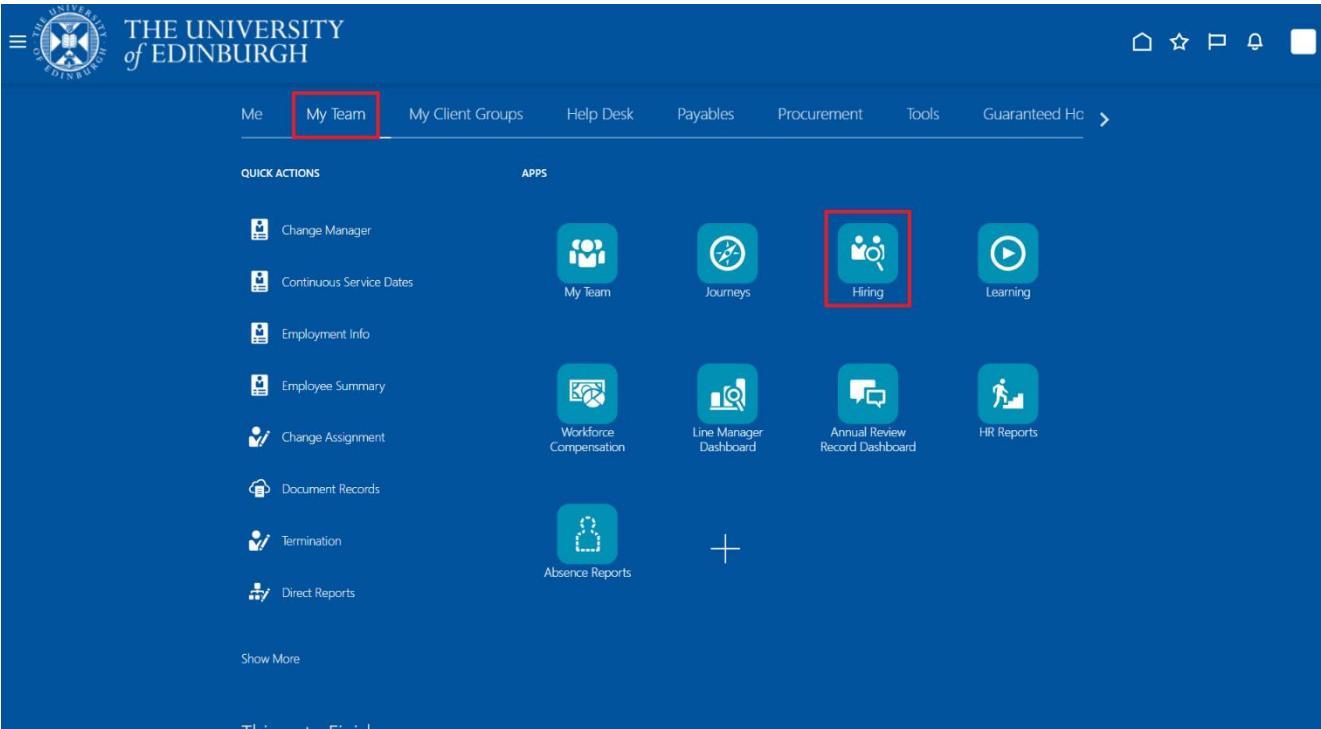
2. There are two tabs at the bottom of the screen: Requisitions and Offers. Ensure the **Requisitions** tab is selected and search for the job requisition using the requisition title, number or description. Then, click on the **number of applications** for the correct job requisition.

3. Select the candidate you want to invite to interview.

4. Select the **Interviews** tab, then click on the **plus +** (**Add**) button.

5. Choose the appropriate **Hiring Team-Managed Template (created in previous steps)** from the **Schedule Title** dropdown

6. Review the information pulled in from the schedule template and edit if required.

For <u>In-Person</u> interviews you can enter an **Address** and any additional **Location Details.** To enter a university location, begin typing the building into the 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 a **phone** number, **web conference link** and/or **access code** can be added

7. Add the **Start Date and Time** and **End Date and Time**.

Select the **Calendar** next to the appropriate field.

a) Select the date from the calendar.

b) Click **Select Time**.
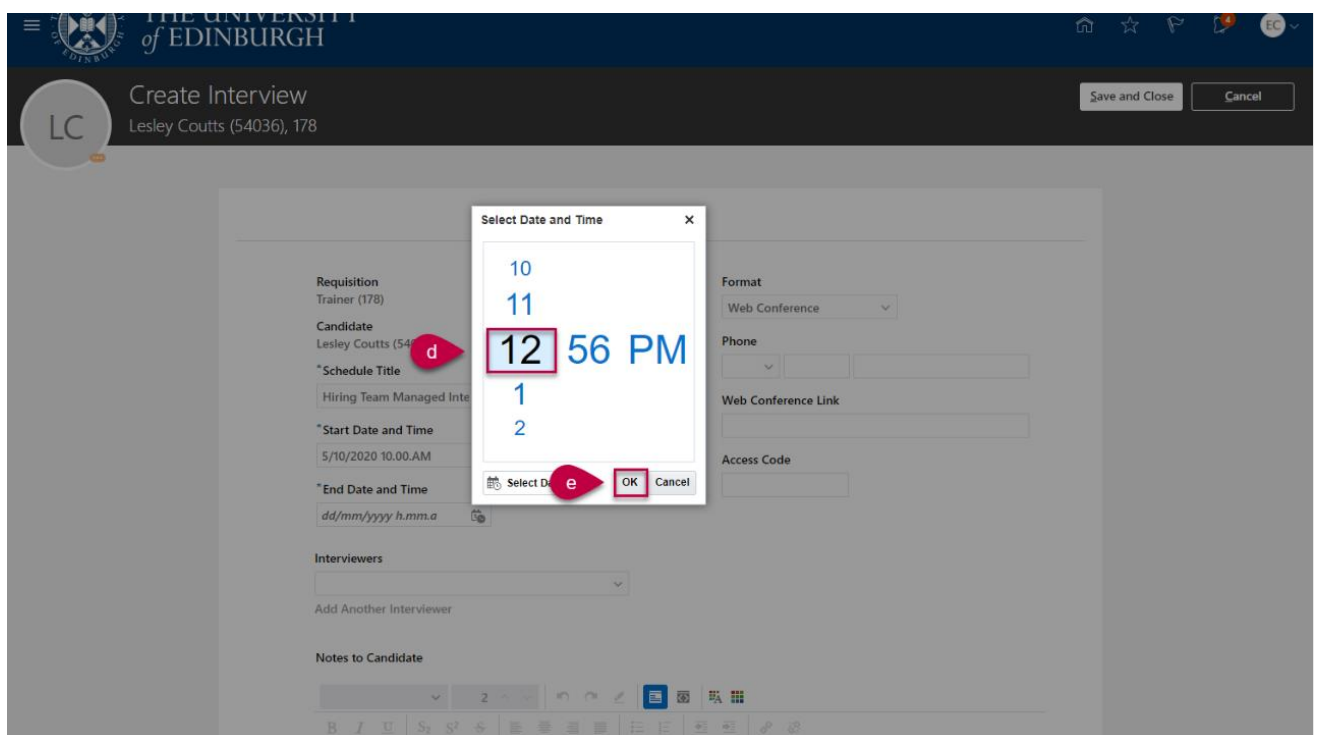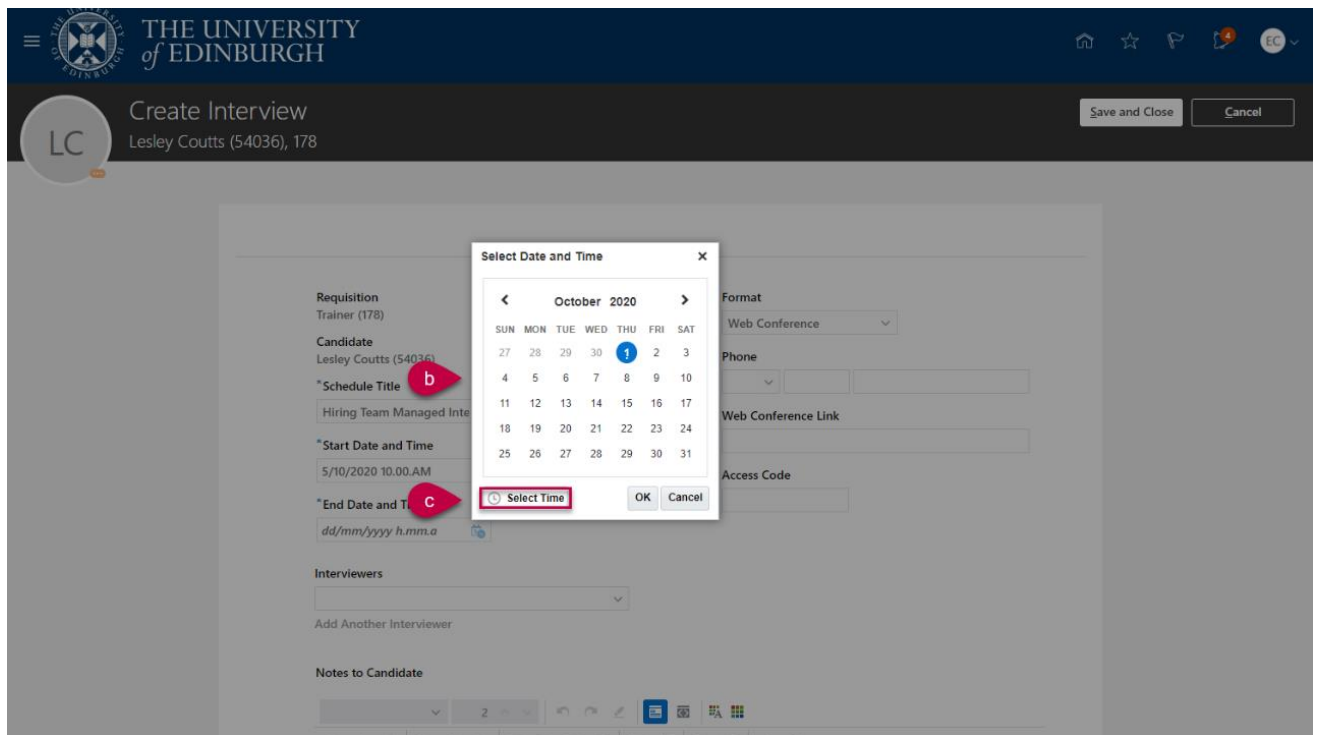
c) Select the hour, minute and AM/PM sections and scroll to the appropriate time or type your selection. By default, Greenwich Mean Time (GMT) should be shown (**it is advised not to change this**). If a candidate has specified a preferred time zone the system will default to that time zone. Make sure that you change the time zone to GMT if this is the case.

Time zone differences: The scheduled interview time may differ from what an external candidate sees within their candidate profile (accessed on the career site). This is because the time adjusts according to their local time based on the time zone of their browser. Additionally, the .ics

attachment in the interview invite will initially show the UTC time, it is only when the .ics is added and saved to their calendar that their correct time zone is reflected.

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

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

9. Add any relevant **Notes to Candidate.** This is any additional information you want to add for a specific candidate (not all candidates). This text will be included in the invite to interview email sent. Please see a copy for the invite to interview template in the appendices.

10. Click **Save and Close** to send the invite to the candidate. An email will be sent to the candidate as soon as save and close is clicked so make sure you have checked the accuracy of the information.

The candidate status should be manually updated to reflect that the interview has been scheduled, to see how this is done, click here.

Once the candidate responds you should update the status further to reflect the candidates response e.g. accepted invitation / declined invitation / awaiting response.
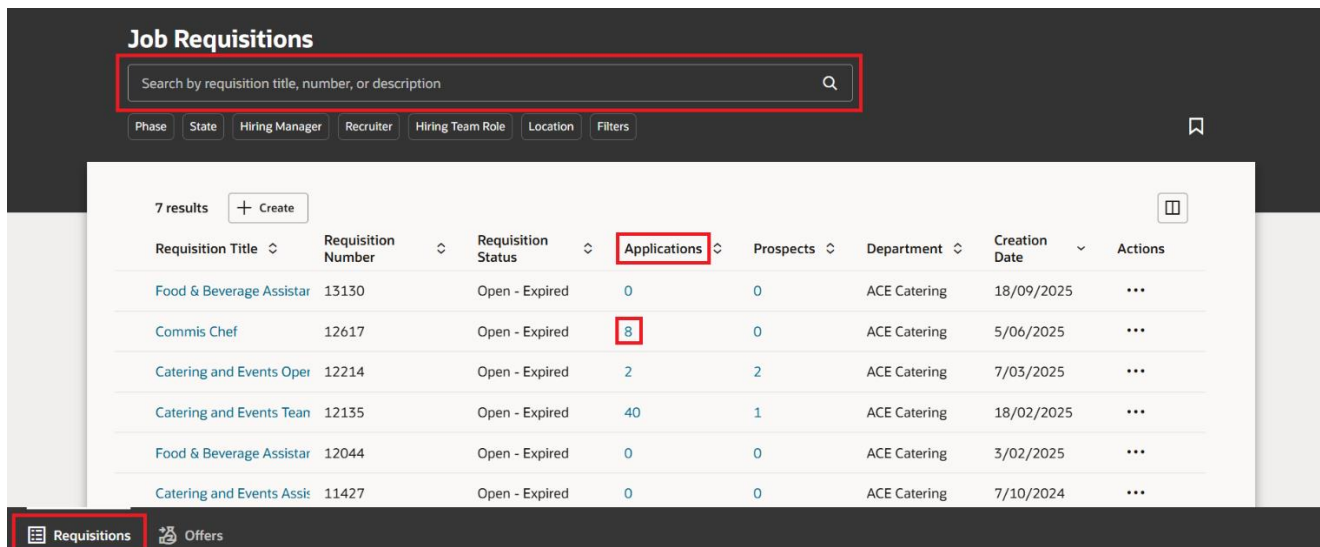
How to Reschedule an Interview

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. Then, click on the **number of applications** for the correct job requisition.

3. Choose the candidate you want to invite to interview.

4. Select the **Interviews** tab, then select the interview.

5. Click **Edit**.

6. Make any required changes, then click **Save,** at this point the candidate will be sent an email advising that their interview has been updated. Members of the Hiring Team will also receive a notification advising them of the update.

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 page in the Hiring app: **Requisitions** and **Offers**.

3. In the **Requisitions** tab, search for the job requisition using the requisition title, number or description. Then, click on the number of applications for the correct job requisition.

4. From the **job applications** screen select the **checkbox** next to the candidates' name and click on the **Move Application** button.

5. In the **Phase** dropdown, select **Interview**.

6. Then, in the **State** dropdown, select **1st Interview Scheduled** then click **Move**.

7. If the candidate cancels an interview and does not plan to reschedule, ensure you update the state to **Withdrawn by Candidate.** To do this, repeat steps 4 and 5 of this section, then in the **State** dropdown, select **Withdrawn by Candidate**. Click on the **Move** button to save the new status.
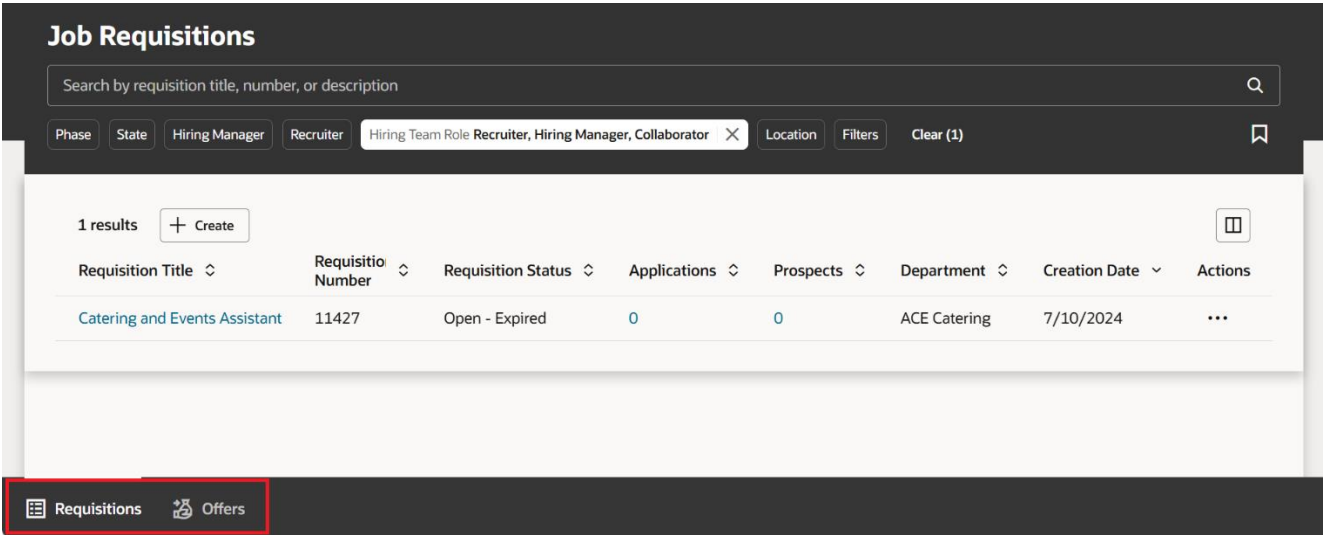
How to Cancel an Interview

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 page in the Hiring app: **Requisitions** and **Offers**.

4. In the **Requisitions** tab, search for the job requisition using the requisition title, number or description. Then, click on the number of applications for the correct job requisition.

5. Select the appropriate candidate.

7. Select the **Interviews** tab then click on the **Cancel Interview icon**.

Alternatively, you can click on the interview link and select to cancel the interview from this screen.
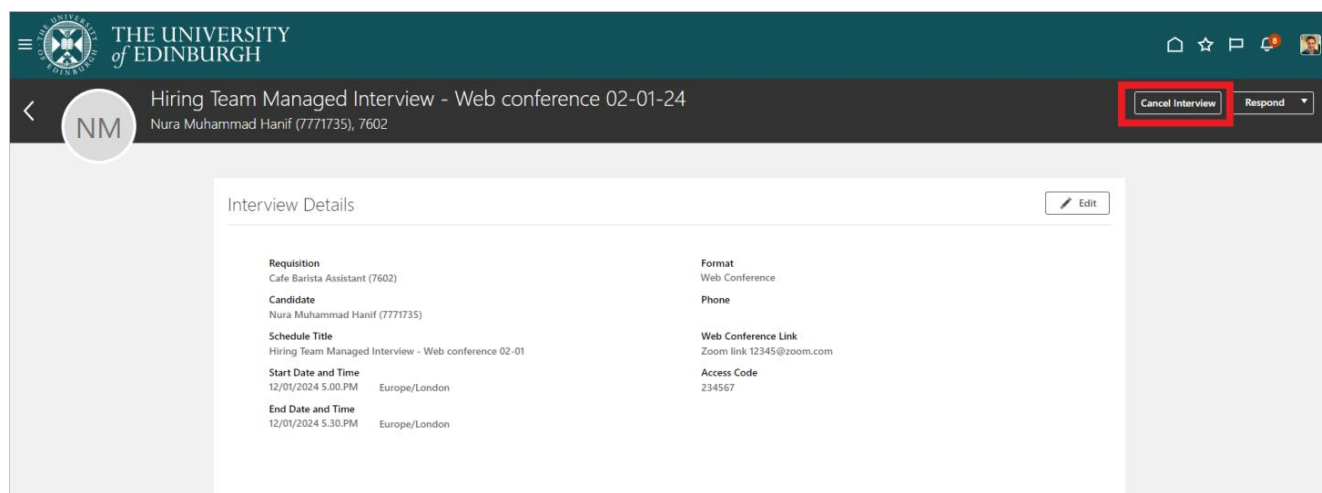
The candidate and hiring team are notified that the interview is cancelled.

Appendix

Appendix A – Example of Invite Email Sent to Candidates
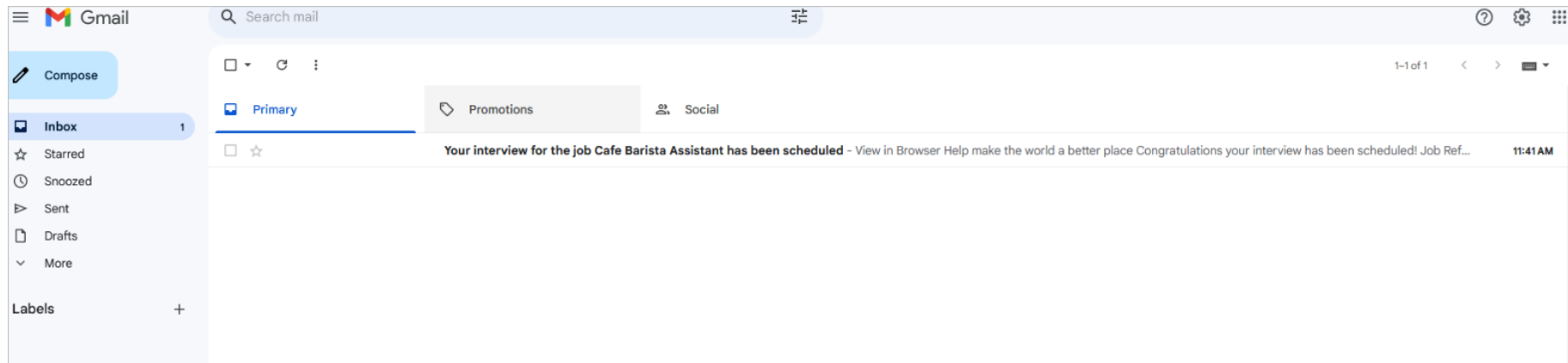
Note the post schedule details and candidates notes section highlighted red and yellow in the image below is for illustration purposes only, it does not appear this way to candidates.

Your interview for the job Cafe Barista Assistant has been scheduled Inbox ×

11:41 AM (3 minutes ago)

to me ▾

THE UNIVERSITY of EDINBURGH

Help make the world a better place

Congratulations your interview has been scheduled!

Job Reference: 7602

Dear Nura

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: 12/01/2024 11.00.AM Europe/London
Requisition: Cafe Barista Assistant
Interview Type: Web Conference
Interviewer(s): Craig Hennessy

Location: Zoom link 12345@zoom.com Phone Number: Access Code: 234567

<mark>THIS IS WHERE TEXT YOU ENTERED IN THE **POST-SCHEDULE DETAILS SECTION** OF THE INTERVIEW SCHEDULE APPEARS TO CANDIDATES</mark>

<mark>THIS IS WHERE THE **NOTES TO CANDIDATE** TEXT YOU ENTERED ON THE CANDIDATES HIRING TEAM MANAGED INTERVIEW APPEARS</mark>

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 Craig Hennessy on Craig.Hennessy@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,

Craig Hennessy

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 B – Example showing the notification sent to the hiring team for an arranged interview

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...

Dismiss

THE UNIVERSITY *of* **EDINBURGH**

Hello,

Here are the details of the interview that has been scheduled with ████████████

Date and Time: 26/01/2024 10.15.AM Europe/London
Requisition: Cafe Barista Assistant - 7602
Interview type: Web Conference
Interviewer: Craig Hennessy

Location: Zoom link 12345@zoom.com Phone Number: Access Code: 234567

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, navigate to the details tab, open the Posting Description section, and click the provided link to view the complete job description.

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 C – Example showing what the candidate sees when they click on interviews scheduled within their candidate

profile (accessed via the Career Site)

Your interview is scheduled. Here are the details.

Friday, January 12, 2024
11:00 AM - 12:00 PM Europe/London

Access Code **234567**
Web Conference **Zoom link 12345@zoom.com**
Interviewer **Craig Hennessy**

Cancel Interview

THIS IS WHERE TEXT YOU ENTERED IN THE **POST-SCHEDULE DETAILS SECTION** OF THE INTERVIEW SCHEDULE APPEARS TO CANDIDATES

THIS IS WHERE THE **NOTES TO CANDIDATE** TEXT YOU ENTERED ON THE CANDIDATES HIRING TEAM MANAGED INTERVIEW APPEARS

BACK TO MY PROFILE

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.