



## System User Guide

# Line Manager and School/Department Administrator (SDA) - How to Request a New Position or Position Change

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## Introduction

This guide covers key tasks for **Line Managers and School/Department Administrators (SDAs)** in ‘**How to request a new position or position change**’ system process. It is related to the [Guide to Job Classifications and Position Management](#).

New positions should only be requested when one doesn’t currently exist within the structure of a specific department with the appropriate Job level.

The position change function can be used to make changes for the following reasons, please note there could be one or a combination of changes (e.g. increase FTE and add a new grade):

- Increase/Decrease the FTE of a position
- To add a new grade within a grade band on a position
- Change the position hiring status or close a position

To make any other changes, such as changing the position name please raise a service request using the category Enquiry > System Related.

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

School/Department Administrators (SDA’s) and Line Managers will be able to view all positions (both filled and vacant within the structure) and the FTE against these in the position detail page.

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

Changes to a Job Level should be requested by completing the [Job level Change Form](#) and submitting this via service request using the category Enquiry>System Related, please ensure the title is ‘Job Level Change Request’.

## In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips are provided within the ‘In Detail’ section.

### Search Positions

1. From the **Home** page, select **My Client Groups** and then **Show More**.
2. Select **Positions** from the **Workforce Structures** section.
3. Enter the **Position Name or code** into the search field then click the search icon.

4. Select the **filters** to view further search options.
5. Click the position to view more details.

### Request a New Position

1. From the **Home** page, select **My Client Groups** and then **Show More**.
2. From the **Workforce Structures** section, select **Request a New Position**.
3. Complete **When and Why** and click **Continue**.
4. Complete **Position Details**.
5. Click **Submit**.

### Request a Position Change

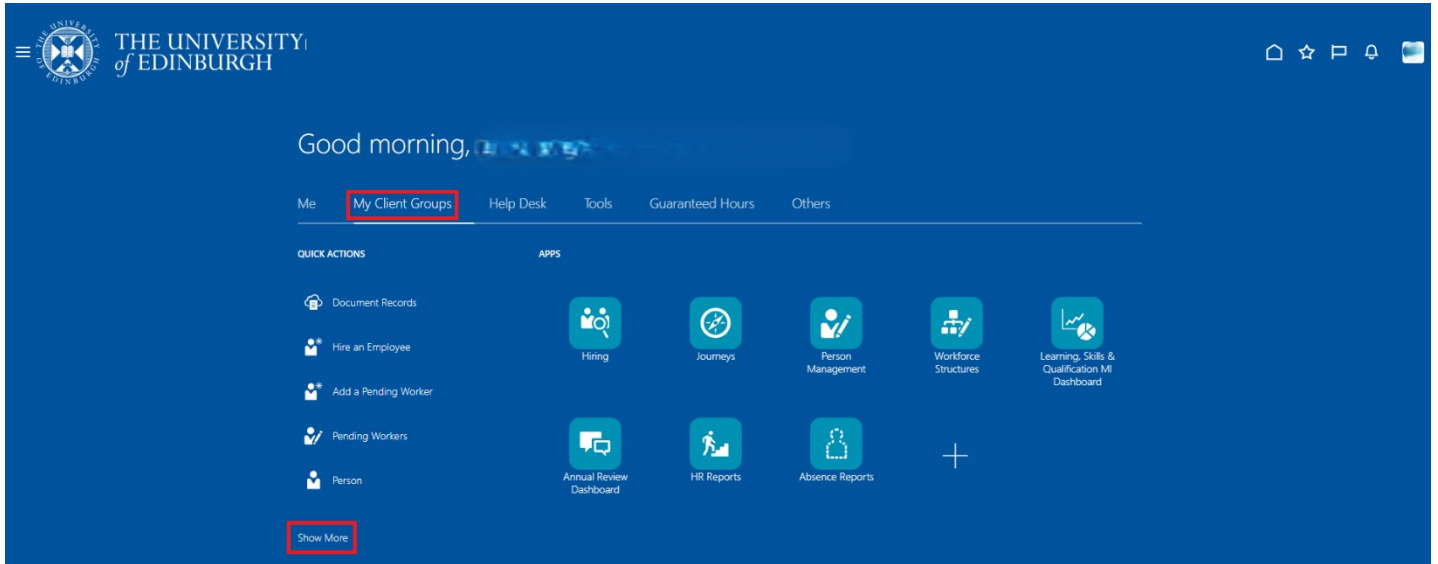
1. From the **Home** page, click on **My Client Groups** and then **Show More**.
2. From the **Workforce Structures** section, select **Request a Position Change**.
3. Search for the **Position** which requires a request for change.
4. Click on the **Position**.
5. Complete **When and Why** and click **Continue**.
6. Update the **Position Details**.
7. Click **Submit**.

## In Detail

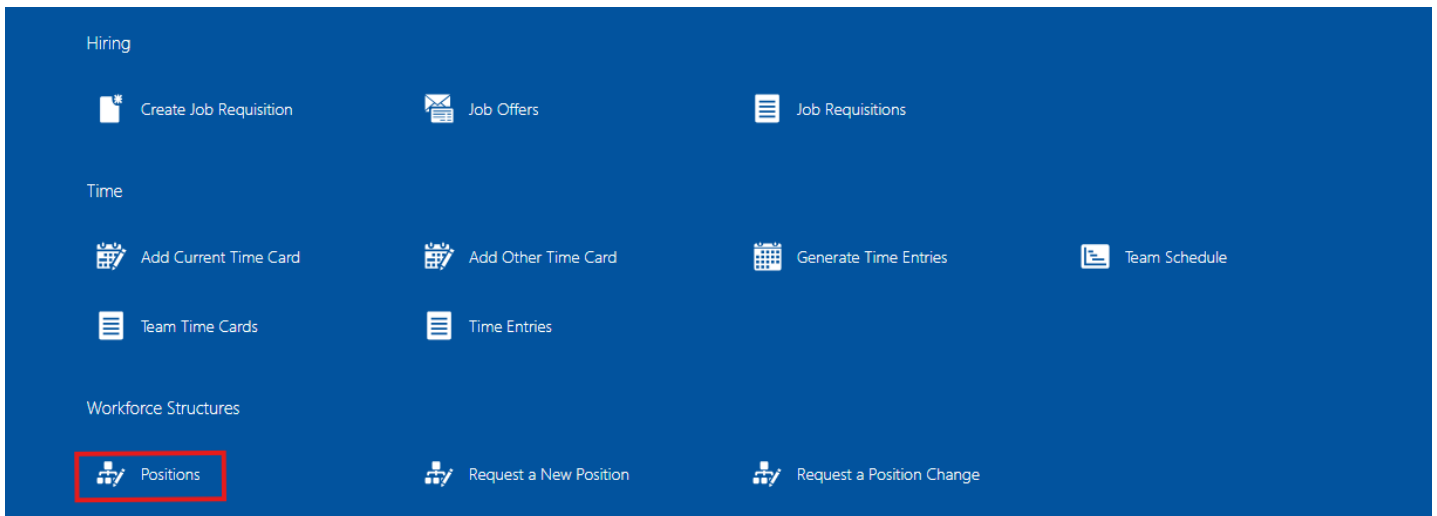
This section provides the detailed steps and includes relevant screenshots from the system.

### Search Positions

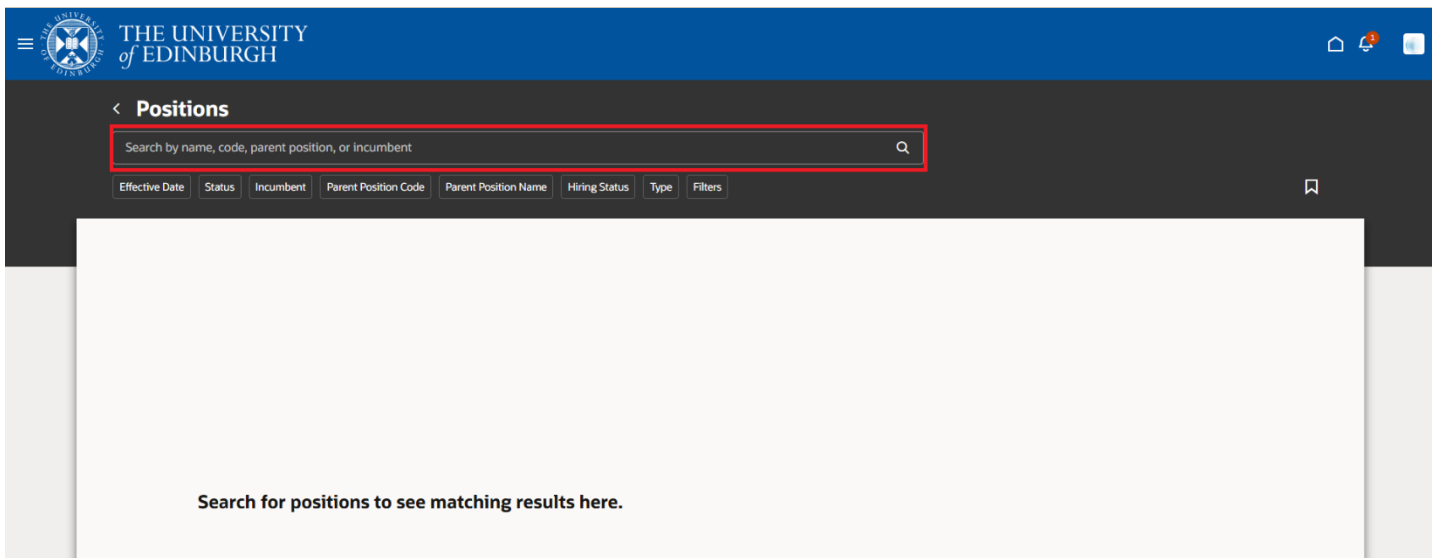
1. From the **Home** page, select **My Client Groups** and then **Show More**.



2. Select **Positions** from the workforce structures section.



3. The search function and filters at the top of the screen allow you to quickly find a position. Enter the **Position Name or code** into the search field then click the search icon.



**Tips:**

- It's best to use generic job names where possible and search for 'administrator' rather than 'senior administrator' or 'Administration manager' to ensure you are presented with all options.
  - If the new position or position change has a future effective date, you may need to enter this into the **Effective Date** filter so that it shows in the list.
4. There are a number of columns of information you can view. You can customise and reorder these by clicking on the customise columns icon on the right of the screen and then selecting the columns you would like to view. By default, the columns displayed are:

- Name
- Code
- Status
- Incumbents
- Parent Position Name
- Job Name
- Department Name – select the relevant Department
- Location name
- Business Unit

If you can't see all of the columns, press Shift + scroll on your mouse to view.

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< Positions

Search by name, code, parent position, or incumbent

Effective Date Status Incumbent Parent Position Code Parent Position Name Hiring Status Type Filters

Sort By Relevance

Name	Code	Status	Incumbents	Parent Positi...	Job Name	Department Name	Location Name	Business Unit
Ambassador (A1) (PAO - Student Services)		Active	multiple		Ambassador (A1) (PAO - Student Services)	SRA Directors Office		University of Edinb
Reader (D1) (ACAD - Lectureships)		Active	multiple		Reader (D1) (ACAD - Lectureships)	Department of European Lang...		University of Edinb
Business Development (C1) (PAO - Development)		Active	multiple		Business Development (C1) (PAO - Development)	Development and Alumni		University of Edinb
Director (C1) (ACAD - Teacher)		Active	Harvey Dingwall		Director (C1) (ACAD - Teacher)	Design		University of Edinb

5. If you are a **School/Department Administrator**, you can also establish the position number by going to My Client Groups -> Person Management -> Searching the person currently in post -> selecting the ellipsis next to position will give you the position name and number.

Employment

Legal Employer University of Edinburgh Country United Kingdom

Worker Type Employee Hire Date 21/09/2020

Assignment: Change Analyst

Action Extension of Fixed Term Contract Effective Start Date 1/10/2021 ( 1 of 1 )

Action Reason Additional Funding Available Effective End Date

Assignment Details

Assignment Number E183645-2 Business Unit University of Edinburgh Person Type Employee

Assignment Status Active - Payroll Eligible Primary Yes Projected End Date 31/10/2022

Headcount 0 Start Time 08:30 AM End Time 05:00 PM Basis for Seniority Calculation Days

Job Details

Position Programme Coordinator (C1) (PAO - Administration)

Job Programme Coordinator (C1) (PAO - Administration)

Grade Ladder University Grade Ladder Grade U06

Department Service Excellence Programme

Reporting Establishment Location Argyle House, Floor F, East

Working at Home No Worker Category Fixed Term Assignment Category Regular or Temporary Full Time or Part Time Working as a Manager No Hourly Paid or Salaried Working Hours 35 Frequency Weekly Standard Working Hours 35 Weekly FTE 1

Programme Coordina... 00290

Parent Position Job Programme Coordinator (C1) (PAO - Administration) Location Union Collective Agreement FTE 6 Head Count 1

Worker Engagement Details Uniformed grade Standard Working Hours Override Role Identifier Fixed Term Reason Code Time limited activity BHS Honorary Contract Contract Review Date Research/Teaching/Research/Teaching Only HESA Activity Standard Occupational Classification Business, Research and Administrative Professionals Level XperHR level L HESA Reason for End of Contract Clinical Increment Date People Group

6. If no positions are returned, you will need to [Request a New Position](#).
7. Click the name of the position to view more information held on that position.

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< Positions

Search by name, code, parent position, or incumbent

Effective Date Status Incumbent Parent Position Code Parent Position Name Hiring Status Type Filters

Sort By Relevance

Name	Code	Status	Incumbents	Parent Positi...	Job Name	Department Name	Location Name	Business Unit
Ambassador (A1) (PAO - Student Services)		Active	multiple		Ambassador (A1) (PAO - Student Services)	SRA Directors Office		University of Edinb
Reader (D1) (ACAD - Lectureships)		Active	multiple		Reader (D1) (ACAD - Lectureships)	Department of European Lang...		University of Edinb
Business Development (C1) (PAO - Development)		Active	multiple		Business Development (C1) (PAO - Development)	Development and Alumni		University of Edinb
Director (C1) (ACAD - Teacher)		Active	Harvey Dingwall		Director (C1) (ACAD - Teacher)	Design		University of Edinb

For details of the naming convention for positions see [Appendix 3](#).

**Note:** if the department has been renamed as part of the bi-annual hierarchy changes, the Department field will show the old department name.

- a. Check that the grades held against the position contain the one you wish to recruit/appoint to. If Yes, continue, if no, select a different position from your search results or [Request a New Position.](#)

The screenshot shows a job requisition page for 'Reader (D1) (ACAD - Lectureships)' with ID 01272. The page is divided into sections: 'Basic details' and 'Grades'. The 'Basic details' section contains a grid of fields: Effective Date (1/1/1951 -), Action Reason, Status (Active), Parent Position, Business Unit (University of Edinburgh), Name (Reader (D1) (ACAD - Lectureships)), Code (01272), Department, Job (Reader (D1) (ACAD - Lectureships)), Location, Full Time or Part Time, Regular or Temporary, Standard Working Hours (35 Weekly), Working Hours, Hiring Status (Approved), Type (Shared), FTE (3.5), Probation Period (12), Probation Period Unit (Month), and Overlap Allowed (On). The 'Grades' section is highlighted with a red box and lists three valid grades: UE09 (University of Edinburgh Set), UE10 (University of Edinburgh Set), and ACT3 (University of Edinburgh Set). Below the grades is the 'Entry grade' section, which shows 'Entry Grade: UE09'. A 'Create Requisition' button is located in the top right corner.

- b. Check that those names listed as current incumbents of the position are in an equivalent role to the type of position you wish to recruit/appoint to. If Yes, continue, if no, select a different position from your search results or [Request a New Position.](#)

## Incumbents

Total FTE  
3

Vacant FTE  
0.5

Reader

FTE  
1

Assignment Status  
Active

Position Entry Date

Assignment Type  
Employee

Position Exit Date  
31/12/4712

Reader

FTE  
1

Assignment Status  
Active

Position Entry Date

Assignment Type  
Employee

Position Exit Date  
31/12/4712

Reader

FTE  
1

Assignment Status  
Active

Position Entry Date

Assignment Type  
Employee

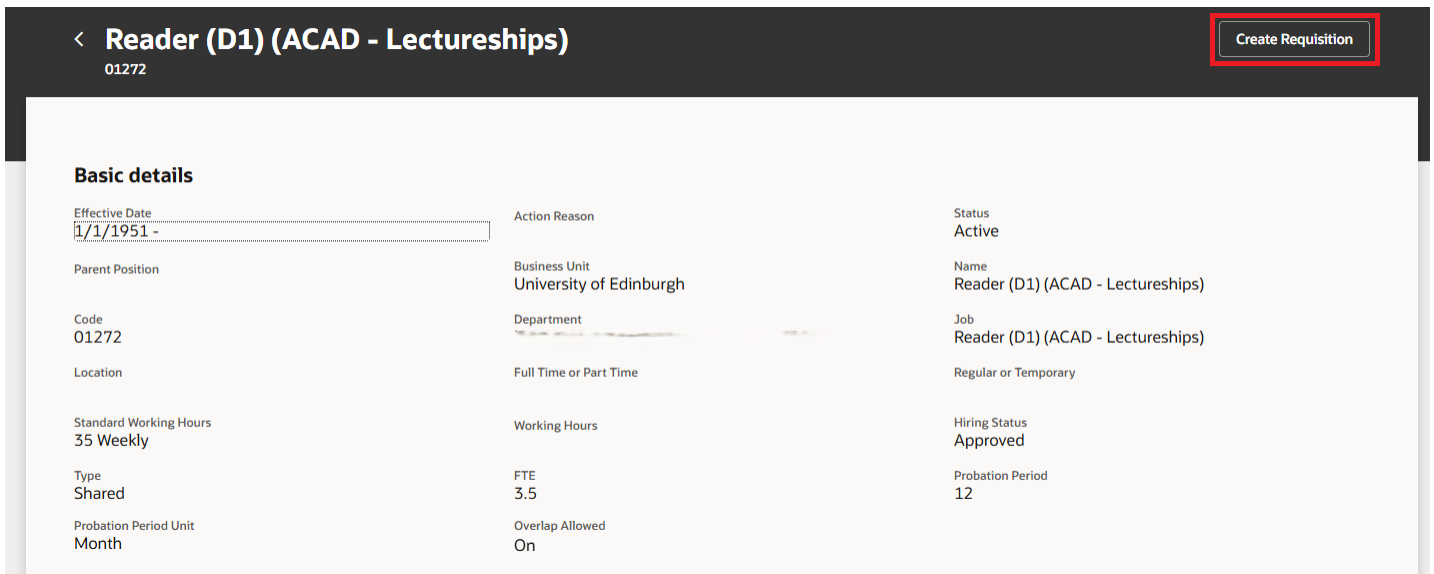
Position Exit Date  
31/12/4712

[Show past incumbents](#)

- c. Check the Vacant FTE on the post is enough to cover your recruitment activity. If Yes, continue with your recruitment activity, noting the position number to recruit to. If no, see the steps below.

The screenshot shows the 'Incumbents' page with a red box highlighting the 'Total FTE' (3) and 'Vacant FTE' (0.5) values. Below this, three incumbent records are listed, each for a 'Reader' position with an FTE of 1, an 'Active' status, and an 'Employee' assignment type. All three records have a 'Position Exit Date' of 31/12/4712. A link to 'Show past incumbents' is visible at the bottom of the list.

- If there is sufficient FTE to recruit your new hire, you can select **Create** Requisition which will allow you to create a Job Requisition if you so wish.

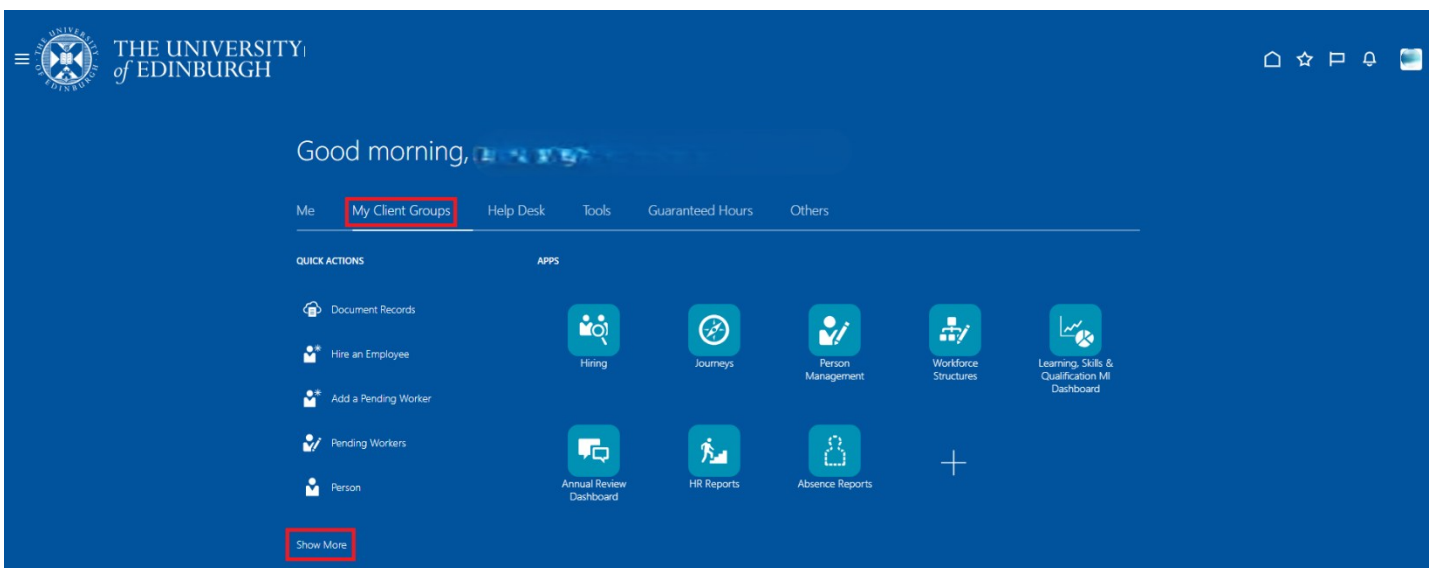


Basic details		
Effective Date	Action Reason	Status
1/1/1951 -		Active
Parent Position	Business Unit	Name
	University of Edinburgh	Reader (D1) (ACAD - Lectureships)
Code	Department	Job
01272		Reader (D1) (ACAD - Lectureships)
Location	Full Time or Part Time	Regular or Temporary
Standard Working Hours	Working Hours	Hiring Status
35 Weekly		Approved
Type	FTE	Probation Period
Shared	3.5	12
Probation Period Unit	Overlap Allowed	
Month	On	

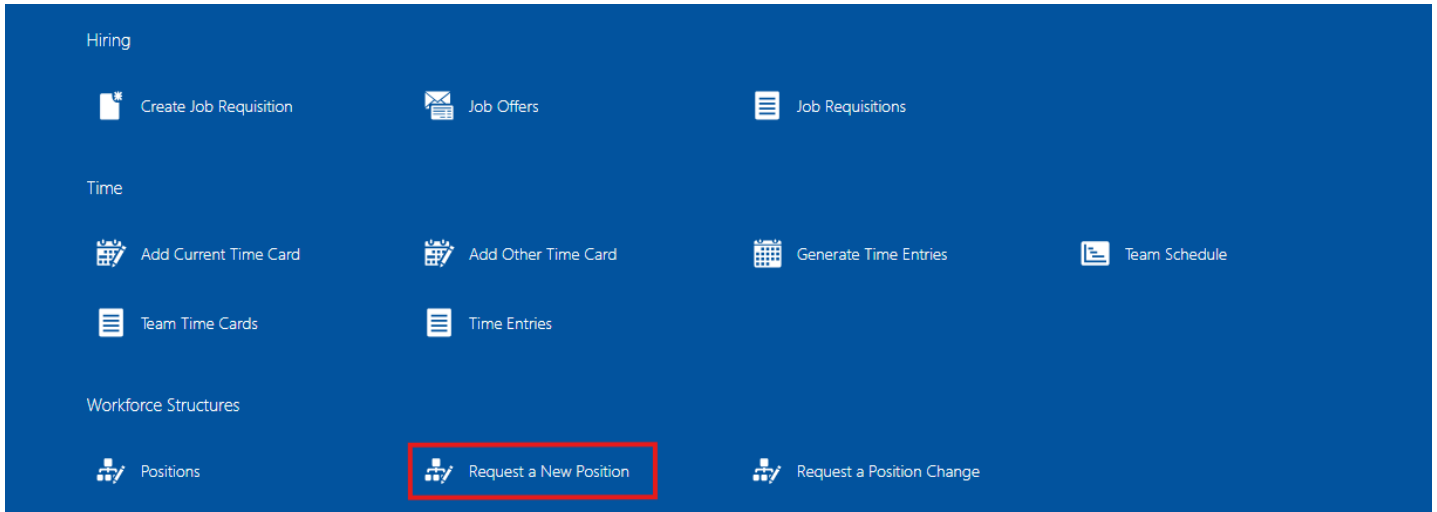
- If there is insufficient FTE to recruit/appoint your new hire, you need to [Request a Position Change](#).

## Request a New Position

- From the **Home** page, select **My Client Groups** and then **Show More**.



2. From the **Workforce Structures** section, select **Request a New Position**.



3. Complete the **When and Why** section and click **Continue**.

- a. **When does the new position start** – enter relevant date
- b. **What's the reason for this request?** – select the relevant option from the dropdown list  
(See [Appendix 1](#) for an explanation of the **Request a New Position reasons**.)

A screenshot of a web form titled 'Request a New Position'. The section is labeled 'When and why'. There are two input fields: 'When does the new position start?' with a calendar icon and a 'Required' label below it, and 'What's the reason for this request?' with a dropdown arrow. At the bottom, there are three buttons: 'Cancel', 'Continue', and 'Submit'. On the right side, there is a dark grey sidebar with '1 | 2' at the top and 'When and why' at the bottom.

4. Complete **Position Details**, ensuring that the fields are populated accordingly and click **Continue**:

- **Status** – This will pre-populate to **Active**, do not change this.
- **Business Unit** – This will default to University of Edinburgh, change if required
- **Name** –this **must be the same name as the Job** you select, we suggest selecting job first,

copying this and then pasting into the Name field

- **Department** – select relevant department
- **Job** – select relevant job by typing in the name, e.g. ‘Admin’ and the relevant options will appear in the dropdown list. Select the appropriate Job Instance with the appropriate Job level.
- **Standard Working Hours** – this will automatically default to 35 Weekly but can be amended if required
- **Frequency** – **this will default to Weekly, do not change this.**
- **Working Hours** – **Remove the value in this field.**
- **Frequency** – **Remove the value in this field.**
- **Hiring Status** – **will default to ‘Approved’ do not change this.**
- **Type** – **will default to Shared, do not change this.**
- **Probation Period** – select the number
  - For UE02 – UE05 it’s 6 months
  - For UE06 – UE10 it’s 12 months
- **Probation Period Unit** – this must always be **Month.**
- **Overlap Allowed** – **this will default to Yes, do not change this**
- **FTE** – enter the relevant FTE being recruited to
- **Grade Ladder** – select University Grade Ladder
- **Grade** – these will pull in automatically from the selected Job but this can be amended and new grades added.  
**Note:** when adding grades, you must ensure they all have the same terms and conditions.
- **Entry Grade** – **this field should remain blank.**

Request a New Position

## Position details

Status Active	Business Unit University of Edinburgh
Name Administrator (C1) (PAO - Human Resources)	Code Generated automatically
Department Philosophy, Psychology and Language Sciences	Job Administrator (C1) (PAO - Human Resources)
Standard Working Hours 35	Frequency Weekly
Working Hours 35	Frequency Weekly
Hiring Status Approved	Type Shared
Probation Period	Probation Period Unit

Overlap Allowed  
 No  Yes

FTE  
1

Cancel **Submit**

### Grades

#### Grade ladder

Grade Ladder  
University Grade Ladder

#### Valid grades

+ Add

#### UE06

UE06  
University of Edinburgh Set



#### Entry grade

Entry Grade  
UE06

Cancel **Submit**

2 | 2

When and why

Position details

When and why

Position details

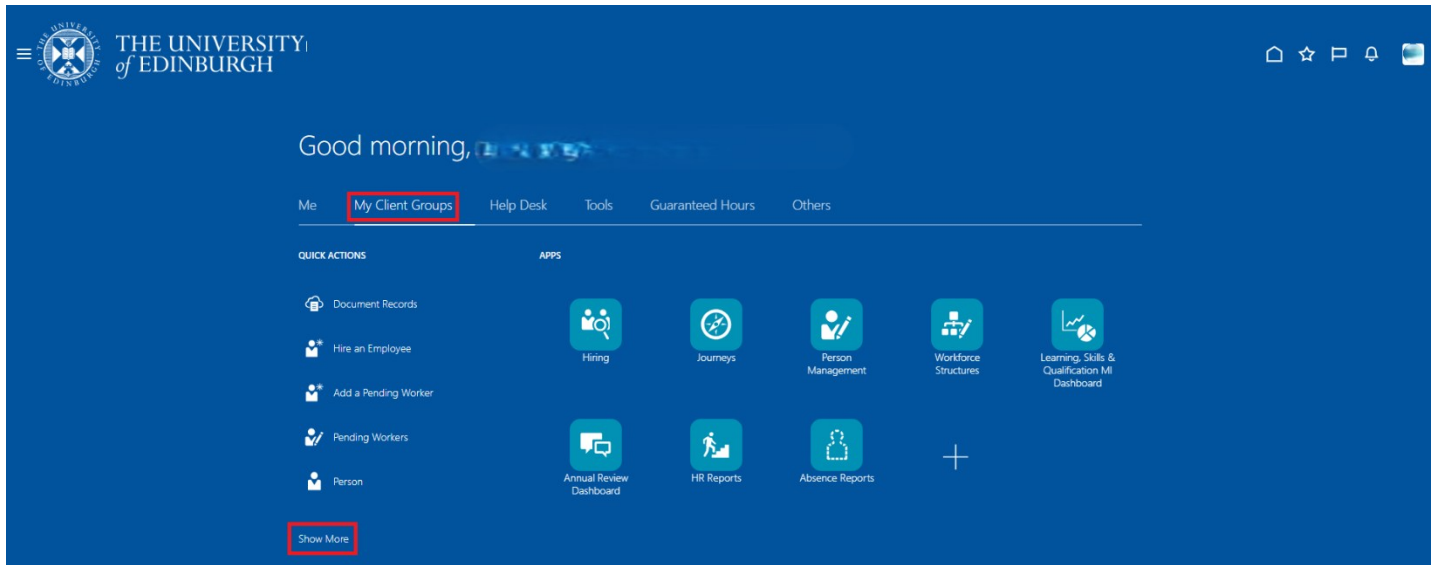
5. Click **Submit**. This will be sent to HR Systems for approval and the **Home** page reopens.  
**Note:** In the event of rejection, review comments from HR Systems and re-submit a fresh transaction. It is not possible to re-draft a previous submission.

6. Once approval notification has been received, navigate back to the [Position](#) screen to search for the position to get the number.

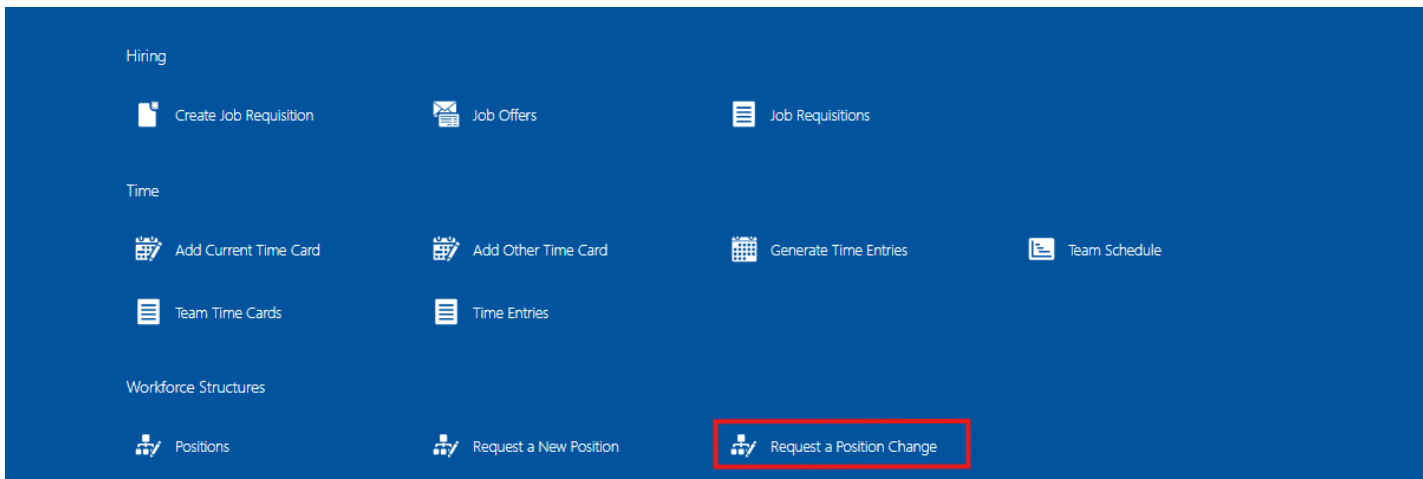
**Note:** you may need to apply filters on the **effective date** and **department** to find the new position.

## Request a Position Change

1. From the **Home** page, select **My Client Groups** and then **Show More**.

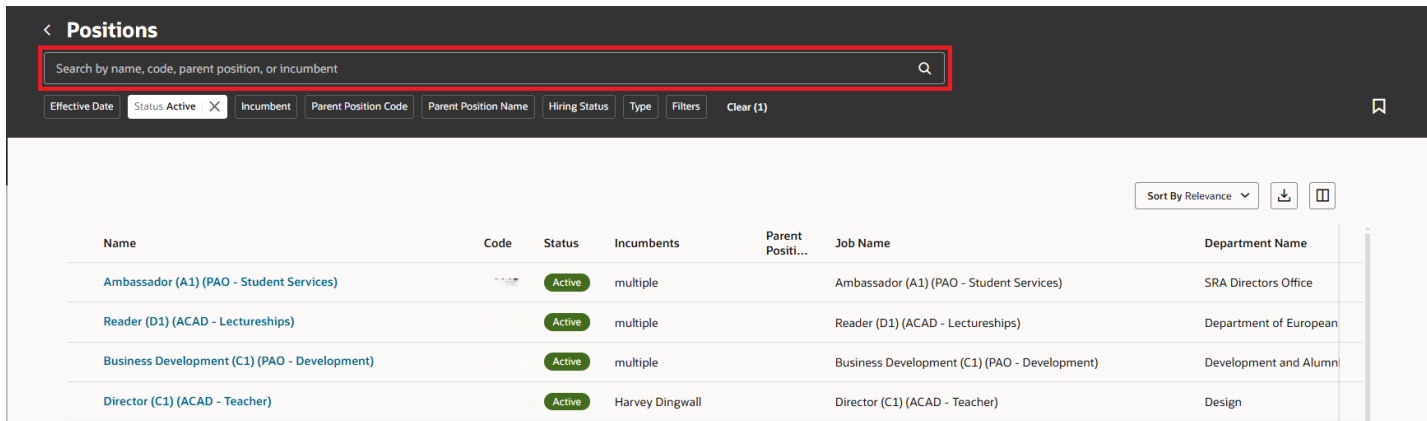


2. From the **Workforce Structures** section, select **Request a Position Change**.

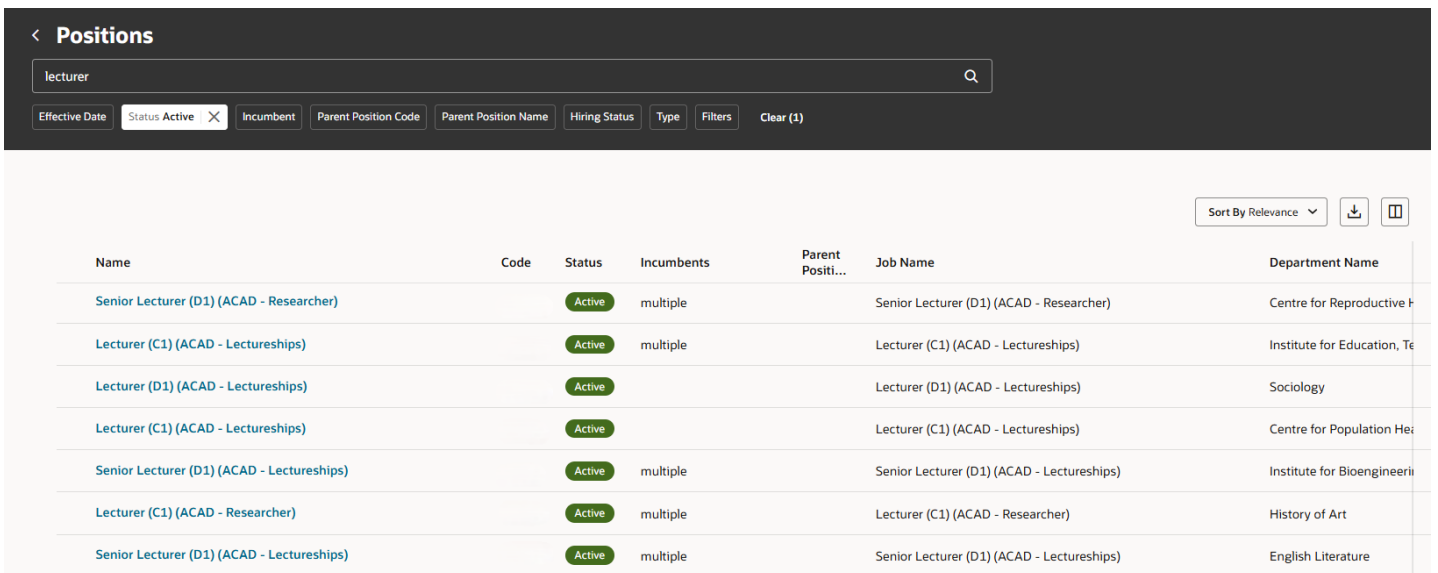


3. Click into the **Search** field, enter the **Position** and click the search icon.

**Note:** To perform a more specific search, click on **Filters** link and choose the applicable options



4. Click on the **Position** in the list of results.



5. Complete the **When and Why** section and click **Continue**.

a. **When does the position change start** - enter relevant date


- b. **What's the reason for this request?** - select the relevant option from the dropdown list  
(See [Appendix 2](#) for an explanation of the **Request a Position Change reasons.**)

Request a Position Change

1 | 2

## When and why

Lecturer (C1) (ACAD - Lectureships), 02268

When does the position change start?  Required

What's the reason for this request? ▾

Cancel Continue Submit

When and why

6. Update the **Position details** accordingly:

- a. **Status – this should be kept as active unless there are no current or future incumbents of the position**
- b. **Business Unit – this should not be changed**
- c. **Department – this should not be changed**
- d. **Job – this should not be changed**
- e. **Standard Working Hours – this should not be changed unless required**
- f. **Frequency – this should not be changed**
- g. **Hiring Status – this should only be changed from Approved to Frozen if you have created a new position but the job requisition has been rejected and the position needs to be deactivated.**
- h. **Probation Period – this should not be changed**
- i. **Probation Period Unit – this should not be changed**
- j. **FTE – change as required.**

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

- k. **Grade** – Review the grades listed against the position. If the grade you require is not listed add this. You should **not** remove any grades as this will impact everyone on that grade within the position. Use the grade range provided in the [naming convention](#).  
**Note:** when adding grades you must ensure they all have the same terms and conditions.
- l. **Entry Grade** – if applicable, remove the default and leave this field blank

Request a Position Change

## Position details

Lecturer (C1) (ACAD - Lectureships),

Status Active	Business Unit University of Edinburgh
Name Lecturer (C1) (ACAD - Lectureships)	Code
Department	Job Lecturer (C1) (ACAD - Lectureships)
Standard Working Hours 35	Frequency Weekly
Hiring Status Approved	
Probation Period 12	Probation Period Unit Month
FTE 14	

### Grades

#### Valid grades

+ Add

<b>UE07</b> UE07 University of Edinburgh Set	
<b>UE08</b> UE08 University of Edinburgh Set	
<b>ECA6</b> ECA6 University of Edinburgh Set	
<b>ECA7</b> ECA7 University of Edinburgh Set	

Cancel **Submit**

When and why

Position details

8. Click **Submit**. This will be sent to HR Systems for approved and the **Home** page reopens.  
**Note:** In the event of rejection, review comments from HR Systems and re-submit a fresh transaction. It is not possible to re-draft a previous submission.

## Appendix

### Appendix 1 – Request a New Position Reasons

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

### Appendix 2 – Request a Position Change Reasons

<b>Change Position Request</b>	<b>When to use</b>
Change Position Hiring Status	Only use if job requisition rejected to inactivate position. A position can only be made inactive if there are no incumbents in the position and there are no future hires associated to it.
Close down position	When a position is no longer needed.
Decrease FTE	Decrease headcount
Grade Change	To add a new grade within a grade band on a position
Increase FTE	Increase headcount

### Appendix 3 – Position Naming Convention

Every job follows a strict Job naming convention, the image below shows an example. The position name will mirror that of the job naming convention. Please refer to the [Guide to Job Classifications and Position Management](#) for further details.

<i>Job Name</i>	<i>Grade Band</i>	<i>Job Level Instance</i>	<i>Family Short Code</i>	<i>Function</i>
<i>Director</i>	<i>D</i>	<i>1</i>	<i>POA</i>	<i>Estates and Facilities</i>

Each part of the naming convention has its own purpose:

<b>Job Name</b>	The generic job. All existing staff have been mapped into one of approximately 350 jobs.
<b>Grade Band</b>	For planning purposes, we have created a fictitious grade band. Some jobs at the University range over seven or eight grades which makes it difficult to use if you are planning using salary mid-points. We have split the jobs so that they don't span over more than three salary grades. See below for a full list of <a href="#">Grade Bands</a> .
<b>Job Level Instance</b>	This is used for the <a href="#">Delegated Authority Schedule (DAS)</a> . <b>If a job has more than one approval limit there will be more than one instance of a job level, for example D1, D2, D3.</b> Each job level says how much someone can approve as per the DAS. Where there is more than one instance of a job level care should be taken to select the correct position. This should not be confused with the job level, see further details under Job Level Management in the <a href="#">Guide to Job Classifications and Position Management</a> .
<b>Family short code</b>	This is the abbreviated title for Job Family. This short code saves some space in the job title, for example POA for Professional, Administration and Operational, ACAD for Academic. See the <a href="#">Job Family</a> table below for the full list.
<b>Job Function</b>	The role or service you provide, for example Estates and Facilities, Researcher, Student Services, Finance.

### Job Family

Code	Family	Short Code
001	Academic	ACAD
002	Clinical	CLIN
003	Professional, Administration and Operational	PAO
004	Technical	TECH
005	Veterinary Clinical	VET

## Grade Bands

University

Grade	Grade Band
UE01	A
UE02	A
UE03	A
UE04	B
UE05	B
UE06	C
UE07	C
UE08	C
UE09	D
UE10	D
TR01	C
ARC	A
NONE	AX
OTHS	DX
FAS7	C
SDS1	A
RCB2	DX
RCB3	CX
RCB4	CX
RCB5	CX
RCB6	BX
RCB7	BX
RCB8	AX

Clinical

Grade	Grade Band
AM3A	D
AM3B	D
AMN2	C
AMN3	D
AMN4	D
AMT3	D
AMT4	D
AM2	C
AM4	D
AC4	D
AC3A	D
AC3B	D
ACN2	C
ACN3	D
ACN4	D
ACT4	D
XM1	D
XM2B	D
XM3B	C
XM4B	C
XM5B	C
XM6B	B
XM7B	A

Nurses

<b>Grade</b>	<b>Grade Band</b>
UE5N	B
UE6N	C
UE7N	C

ECA - legacy

<b>Grade</b>	<b>Grade Band</b>
ECA2	A
ECA3	A
ECA4	B
ECA5	B
ECA6	C
ECA7	C
ECA8	C
ECA9	D
ECAT	D

## Version History

<b>Version</b>	<b>Date</b>	<b>Description</b>	<b>Approved By</b>
1.0	25 May 2026	<ul style="list-style-type: none"><li>• Transferred guide to new template</li><li>• Replaced all screenshots to reflect the new look of the Redwood screens</li><li>• Reformatted and reduced Grade band appendix</li><li>• Added in note on grades should have the same terms and conditions</li></ul>	SK

## 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.