



System User Guide

Line Manager/School/Department Administrator (SDA) - Guide to the Hiring App

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Introduction

This guide covers an overview for **Line Managers** and **School/Department Administrators** acting as Hiring Managers or Recruiters during the recruitment process. This guide provides detailed guidance relating to the Hiring App. It is related to the Guide to Recruitment and Onboarding which is linked below.

[Guide to Recruitment and Onboarding](#)

This guide is linked to the [Guide to Creating and Maintaining a Job Requisition](#).

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.

Navigating the Hiring App – Requisitions

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. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. You can also navigate to Offers from here.
3. The search function and filters at the top of the screen allow you to quickly find a job requisition. You can also create a job requisition from here (see How to [Create and Manage a Job Requisition](#) guide for details). To view **inactive** requisitions, click on filters to expand the list and scroll to the bottom of the list of filters and select the toggle button.
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 and then selecting the columns you would like to view.
5. **Actions** appear at the end of all the columns as a static field. Click on the ellipsis (3 dots) to take action on the Job Requisition, the actions displayed **will vary depending** on the phase and state of the requisition.
6. Click on the name of the Job Requisition to view the details.
7. The **Requisition Details** screen will then be displayed navigate between the sections.

Manage Job Applications

1. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. The easiest way to view applications is by clicking on the number from the Applications Column.
2. The list of candidates for that requisition will be displayed. By default, this will show active applications by application status. This screen provides a high-level overview of the candidate records and links to the CV.
3. Using the keywords, filters or sort by at the top of the screen you can refine the list of candidates you wish to review.
4. The Actions and More Actions at the top of the candidate list are available as bulk actions and depend on the phase and state of the candidate, select the candidates you want to take action for. The actions using the ellipsis (3 dots) are candidate specific and depend on the phase and state.

How to Review Applications and Take Action

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 **Hiring**.
2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. The easiest way to view applications is by clicking on the number from the Applications Column.
3. From the Job Applications Screen click on the candidate's name to view the candidate profile and application in full.
4. There are different sections you can review. Use the left and right arrows at the top of the screen to move to the next candidate in the requisition list or click the back arrow on the left to return to the full list of candidates.
5. On the left hand of the screen, you will see some key contact information for the candidate and a progress bar, which shows the phases completed and current phase, click on the link to see further details in the Progress tab. You can also see if the candidate is a current employee or an external applicant.
6. Click on the **ellipsis** (3 dots) to take action, for example, to add the candidate as favourite, move the application (to update the phase and state) or create a job offer. The actions depend on the candidate's phase and state.

Bulk Actions including Bulk Print

Bulk Move

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. Select the candidates you wish to move and click Move Application at the top of the list, update the Phase and State and add a comment if required, then click **Move**.
3. The candidates Application status will then be updated.

Bulk Print (Save Application as a PDF)

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. Select the candidates you wish to bulk download and click on **More Actions**, then select **Save Application as PDF**.
3. Deselect any details you do not wish to include, then click **save**. You will then see an 'Action will be processed' pop up box at the bottom of the screen.

Once the bulk print job has completed you get a notification via the Bell Icon and an Email with the zip file containing all the applications you selected.

Adding Documents to a Candidates Record

There are instances where documents may be added to a candidate's record. For example, when references are sought for the interview process or interview documents are to be added for the panel. To add any documents to the candidate's record, follow the below steps.

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. From the Job Applications Screen, click on the candidate's name to view the candidate profile, then navigate to the Activity Tab, documents.
3. In the Internal Attachments section, click on the pencil icon and upload the document(s). Any documents added here are visible by the hiring team only.

Collecting Feedback after Interview

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. Select the candidate you wish to gather feedback and on the candidate details screen select the ellipsis at the top left of the candidate details, then select **Collect Feedback**.
3. Click **continue** on the Candidates section.
4. Select the respondents from the list or add a name manually, then click **continue**.
5. Select the **Interview Questionnaire** from the drop down, then click **continue**.
6. Ignore Include Documents – this is not required, unless you wish to attach any of the documents listed with the request, then click to continue.
7. Request Details – amend the expiration date and time as required and add a note for respondents. You do not need to tick 'Request a Rating from respondent'.
8. Then click **Submit** at the top of the screen.
9. When the respondents have completed the interview feedback questionnaire, you will receive an email and notification on the Bell icon. This can also be viewed in the Feedback tab of the candidate's record.

How to Reject Candidate(s)

Please note this is a **two step process**. You should send an email using the templates provided to the unsuccessful candidate(s) **before** updating the phase and state.

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.
2. Select the candidate(s) you wish to send a message to and click **More Actions** and select **Send Message**.
3. A send message box will appear on the right of the screen. In the Template field choose from the appropriate template.
4. Return to the Requisition candidate list to update the Phase (e.g. Screening) and State to **Rejected by Employer**. Select the candidates, then click on more actions, update the phase and state and add a comment if required, then click **Move**.
5. The candidates Application status will then be updated and will be viewable by the candidate.

Navigating the Hiring App – Offers

The offers section shows all Job Offers by state (drafted, accepted, withdrawn etc). Please read the separate guide [‘How to create and Manage a Job Offer’](#) for full details on how to draft, extend, and manage job offers.

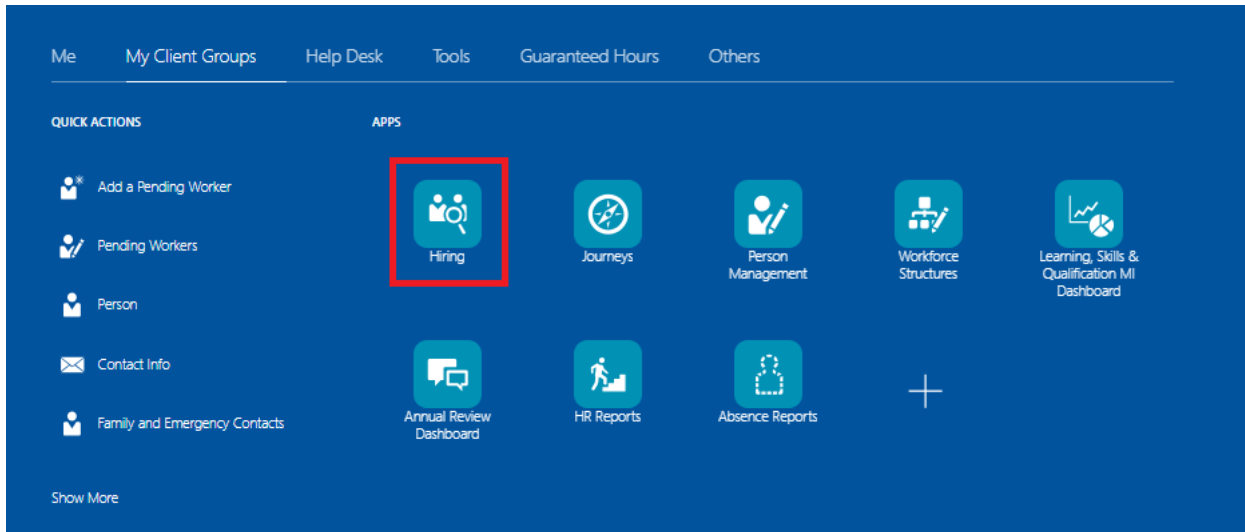
1. From the People and Money homepage select **My Team** (if accessing as a Line Manager) or **My Client Groups** (if accessing as an SDA), then **Hiring**.
2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. From here, navigate to **Offers** at the bottom of the page.
3. The search function and filters at the top of the screen can be used to create a preferred default view.
4. There are a number of columns of information you can view by using the scroll bar underneath the offer list, you can customise these by clicking on the customise columns icon and then selecting the columns you would like to view.
5. **Actions** appear at the end of all the columns as a static field. Click on the ellipsis (3 dots) to take action on the Offers, the action you can take will vary depending on the state of the offer.

In Detail

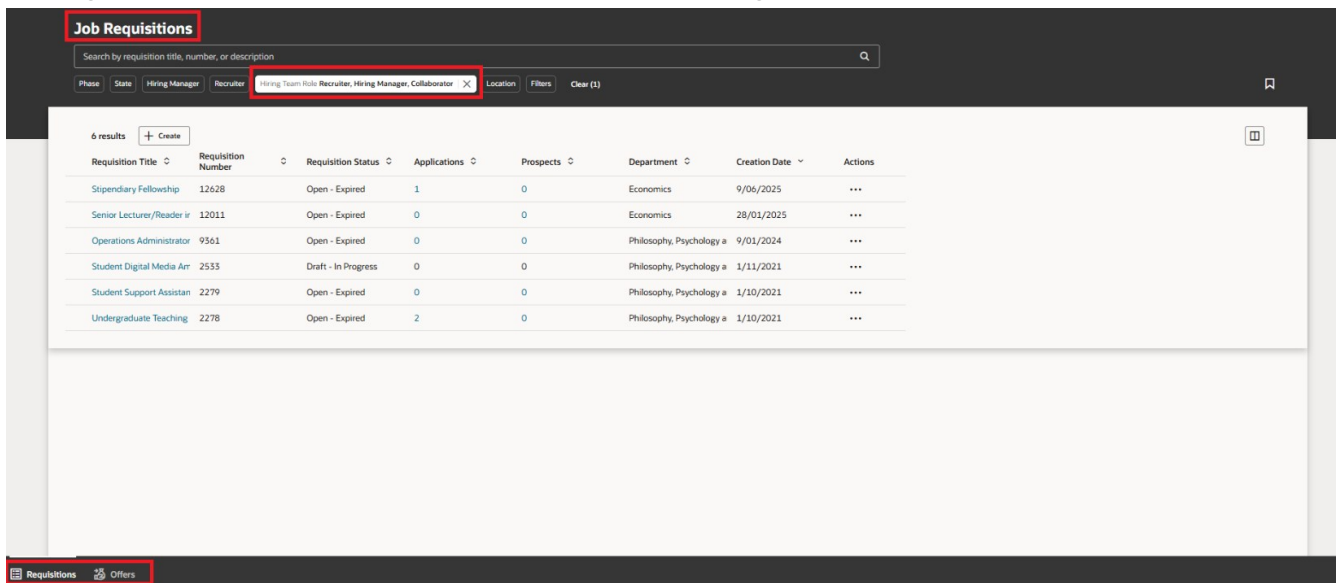
This section provides the detailed steps and includes relevant screenshots from the system. As a Line Manager or SDA you will see two tabs at the bottom of the screen, the default is requisitions where you will see all the job requisitions you are a hiring manager, recruiter or collaborator for, the other tab is Offers where you will see all candidates whom you have made an offer to and manage those offers.

Navigating the Hiring App – Requisitions

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. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. You can also navigate to Offers from here.



3. The **search** function and **filters** at the top of the screen allow you to quickly find a job requisition. You can also create a job requisition from here (see How to [Create and Manage a Job Requisition](#) guide for details). To view **inactive requisitions**, click on filters to expand the list and scroll to the bottom of the list of filters and select the toggle button.

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 and then selecting the columns you would like to view. Your column order and selection will be saved (i.e. if you log out or open a new tab, your preferred view stays how you left it). By default, the columns displayed are:

- Requisition Title – click on this to view the details of the requisition
- Requisition Number
- Requisition Status - (see [appendix 1](#) for further details)
- Applications – All applications, click on the number to view the candidates list
- Prospects – are internal or external candidates that have been referred but have not yet applied
- Department
- Creation Date

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

Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader ir	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Arr	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

5. **Actions** appear at the end of all the columns as a static field. Click on the ellipsis (3 dots) to take

action on the Job Requisition, the actions displayed **will vary depending** on the phase and state of the requisition (example below).

Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader Ir	12011	Open - Expired	0	0	Economics	28/01/2025	Send Message to Team
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	Fill Job Requisition
Student Digital Media Ar	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	Translate Job Requisition
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	Define Interview Schedules
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	Suspend Job Requisition

Tip:

- Translate Job requisition is not in use

6. Click on the name of the Job Requisition to view the details. If the requisition is still in draft, this will take you back to the create job requisition screens to complete and submit. Once submitted for approval, you can view the details of the requisition by clicking on the requisition title from the requisition list.

Job Requisitions

Search by requisition title, number, or description

Phase State Hiring Manager Recruiter Hiring Team Role Recruiter, Hiring Manager, Collaborator Location Filters Clear (1)

Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader Ir	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Ar	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

7. The **Requisition Details** screen will then be displayed; you can navigate between the following sections at the top – these are dynamic screens based on the phase and state of the job requisition.

- Overview – can view applicants from here by clicking on the number
- Details – provides information about the requisition
- Messages – any interactions
- Interviews – to view any interview schedules
- Progress – a record of steps taken to post and hire to the role.
- Feedback – where you can see any feedback submitted

< **Undergraduate Teaching Office Administrator**
2278

Send Message to Team

Fill Job Requisition
Preview Job Requisition
Translate Job Requisition
Cancel Job Requisition

Overview Details Messages Interviews Progress Feedback

Activity overview

New - To be Reviewed 0	Active Applications 2	Hires 2
Unconfirmed Applications 0	Referred Prospects 0	

Key info

Requisition Status Open - Expired	Requisition Type Standard	Requisition Number 2278
Hiring Manager	Recruiter	Recruiting Type Standard
Location Edinburgh - Central Area, Midlothian, United Kingdom		

Tip

- The Action you can take depends on the phase and state of the Job Requisition. Some will be visible via the ellipsis (3 dots) and others more prominently available at the top of the screen. For example, to preview the job requisition or send a message to the hiring team. **Line Managers /SDAs should not use the actions move to posting or open for sourcing, these are strictly for HR use only.**

Manage Job Applications

- 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 **Hiring**.

Me My Client Groups Help Desk Tools Guaranteed Hours Others

QUICK ACTIONS APPS

Add a Pending Worker

Pending Workers

Person

Contact Info

Family and Emergency Contacts

Show More

Hiring

Journeys

Person Management

Workforce Structures

Learning, Skills & Qualification MI Dashboard

Annual Review Dashboard

HR Reports

Absence Reports

- The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. The easiest way to view applications is by clicking on the number from the Applications Column.

Job Requisitions

Search by requisition title, number, or description

Phase State Hiring Manager Recruiter Hiring Team Role: Recruiter, Hiring Manager, Collaborator Location Filters Clear (1)

6 results + Create

Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader in	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Arr	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistant	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

- The list of candidates for that requisition will be displayed, by default this will show active applications by application status, e.g. New, to be reviewed, those that have been moved to an interview phase, and those that are the offer phase. This screen provides a high-level overview of the candidate's record and links to the CV.

Food and Beverage Assistant (12924) Standard

Job Applications

Keywords

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

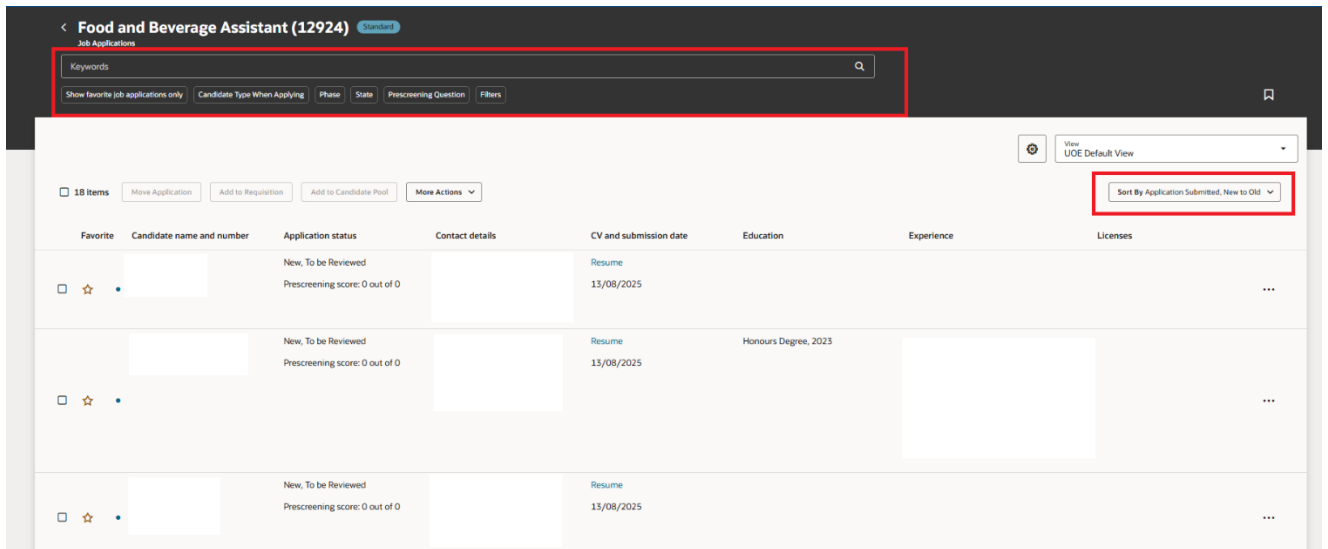
18 items Move Application Add to Requisition Add to Candidate Pool More Actions

View: UOE Default View

Sort By Application Submitted, New to Old

Favorite	Candidate name and number	Application status	Contact details	CV and submission date	Education	Experience	Licenses
<input type="checkbox"/> ☆ ●		New, To be Reviewed Prescreening score: 0 out of 0		Resume 13/08/2025			
<input type="checkbox"/> ☆ ●		New, To be Reviewed Prescreening score: 0 out of 0		Resume 13/08/2025	Honours Degree, 2023		
<input type="checkbox"/> ☆ ●		New, To be Reviewed Prescreening score: 0 out of 0		Resume 13/08/2025			

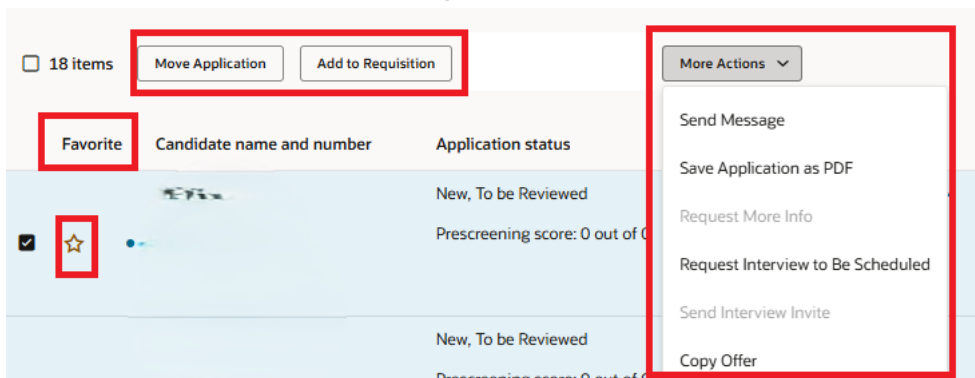
- Using the keywords, filters or sort by at the top of the screen you can refine the list of candidates you wish to review, for example if you only want to view new applicants use the Phase and State 'New and To be reviewed' or candidates selected for interview use the Phase Interview. You can also filter based on answers to prescreening questions.



5. The Actions and More Actions at the top of the candidate list are available as bulk actions and depend on the phase and state of the candidate, select the candidates you want to take action for.

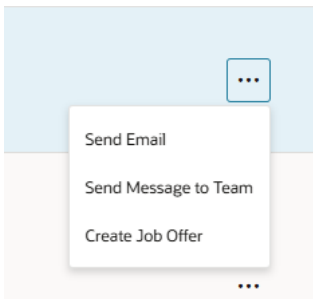
Some examples:

- Move Application – allows you to update the phase and state for the candidate(s)
- Add to requisition- allows you to add the candidates to a different job requisition
- Send Message – to message the candidate
- Save Application as PDF – to download as a PDF
- Request Interview to be scheduled – messages the recruiter
- Copy Offer - allows you to copy an existing offer in bulk.
- Mark as Favourite – allows you to easily find favourite candidates, but the view only applies to you and not all of the hiring team.



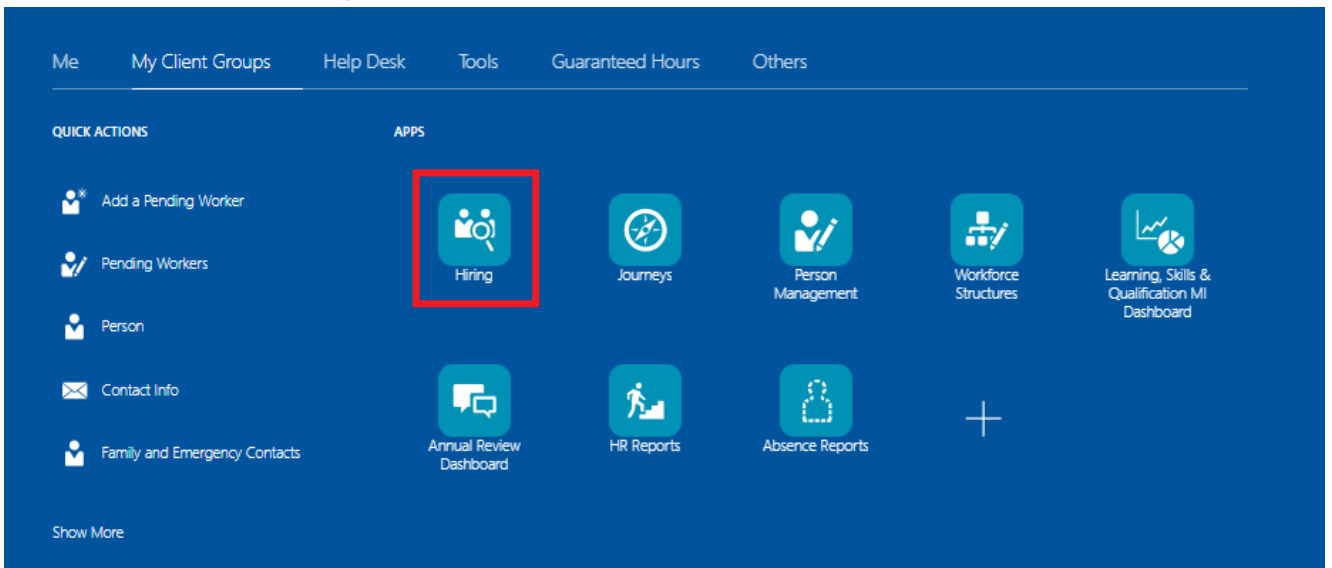
The actions using the ellipsis (3 dots) is candidate specific and depend on the phase and state of the candidate:

- Send Email – email to the candidate
- Send Message to team – message the hiring team
- Create Job Offer – takes you to the job offer screens



How to Review Applications and Take Action

- 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 **Hiring**.



- The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. The easiest way to view applications is by clicking on the number from the Applications Column.

Job Requisitions

Search by requisition title, number, or description

Phase State Hiring Manager Recruiter Hiring Team Role Recruiter, Hiring Manager, Collaborator Location Filters Clear (1)

6 results + Create

Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader Ir	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9561	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Ar	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

- From the Job Applications Screen, click on the candidate's name to view the candidate's profile and application in full. Use the filters at the top of the screen to refine the list.

< **Undergraduate Teaching Office Administrator (2278)** Standard

Job Applications

Keywords

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

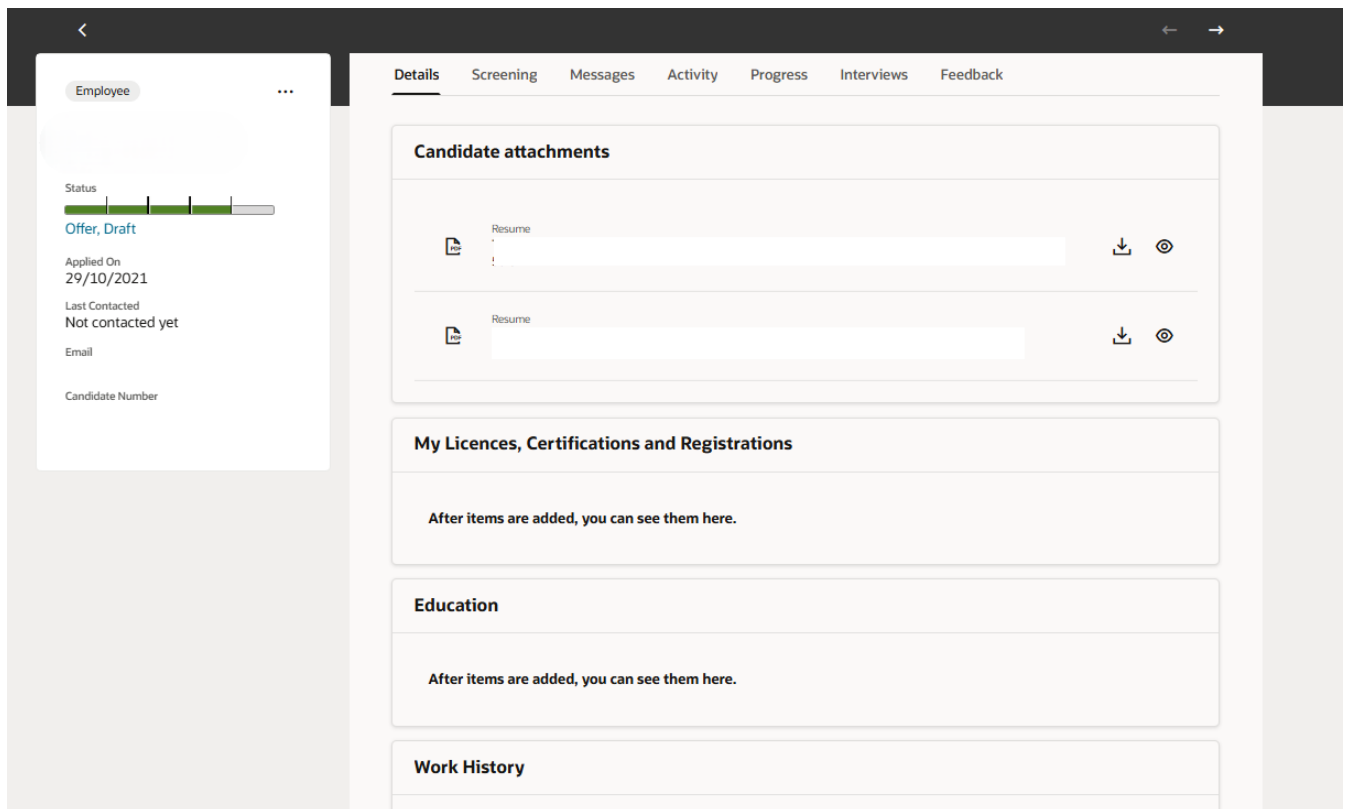
2 items Move Application More Actions

Favorite	Candidate name and number	Application status	Contact details	CV and submission date	Education
<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	

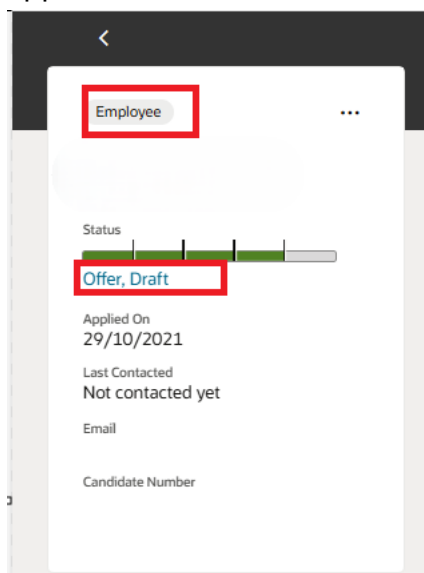
4. There are different sections you can review outlined below:

- Details - view the candidate profile, application and attachments and referee details.
- Screening - review the answers to the pre-screening questions.
- Messages – to message the candidate (text /WhatsApp messages not available for use)
- Activity - add internal attachments and view referee details
- Progress – history of job application progress
- Interviews – details of any interviews scheduled through the system
- Feedback – details any feedback given by the hiring team
- Offer – offer details (will only appear for job offers once in approval stage, not shown on screen shot)

Use the left and right arrows at the top of the screen to move to the next candidate in the requisition list or click the back arrow on the left to return to the full list of candidates.

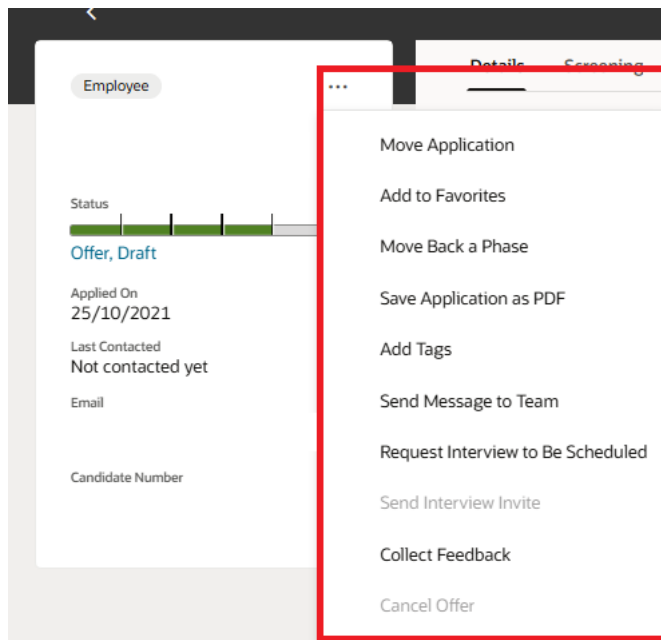


- On the left hand of the screen, you will see some key contact information for the candidate and a progress bar, which shows the phases completed and current phase, click on the link to see further details in the Progress tab. You can also see if the candidate is a current employee or an external applicant.



- Click on the ellipsis (3 dots) to take action, for example, to add the candidate as favourite, move the application (to update the phase and state) or create a job offer. The actions depend on the candidate's phase and state. Some examples:
 - Move Application – update the phase and state

- Add to Favourites – for ease of finding again, noter this is only visible to you, not to the hiring team
- Move Back a Phase – to move the candidate back to a previous phase
- Save Application as PDF – to download the application
- Add Tags – not in use
- Send Message to team – to email the hiring team
- Request Interview to be scheduled
- Collect Feedback – allows you to gather interview feedback from the hiring team
- Create Job Offer – allows you to create the job offer for the candidate



Bulk Actions including Bulk Print

You can take action in bulk from the Job Applications list by selecting all the candidates you wish to take action for. This could, for example, be to move several candidates to a new status e.g. move selected candidates to interview.

To enable accurate university and statutory reporting of the recruitment process please move candidates through each phase in chronological order, for example from New to Screening to Interview to Offer. Once the successful candidate(s) have accepted their offer you should check that any remaining candidates sitting in previous phases have been moved to an appropriate end status (rejected or withdrawn).

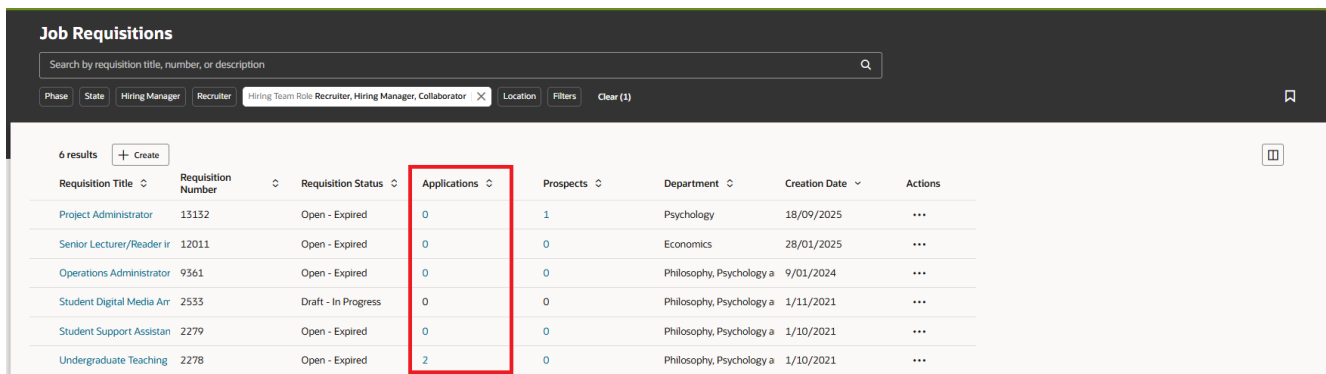
Candidates can be moved to the appropriate phase and state individually or in bulk through the hiring app. See [Appendix 2](#) for a full list.

You can also bulk print (download) selected or all applications (in batches of up to 100). **To bulk reject**

candidates please read the section [below](#).

Bulk Move

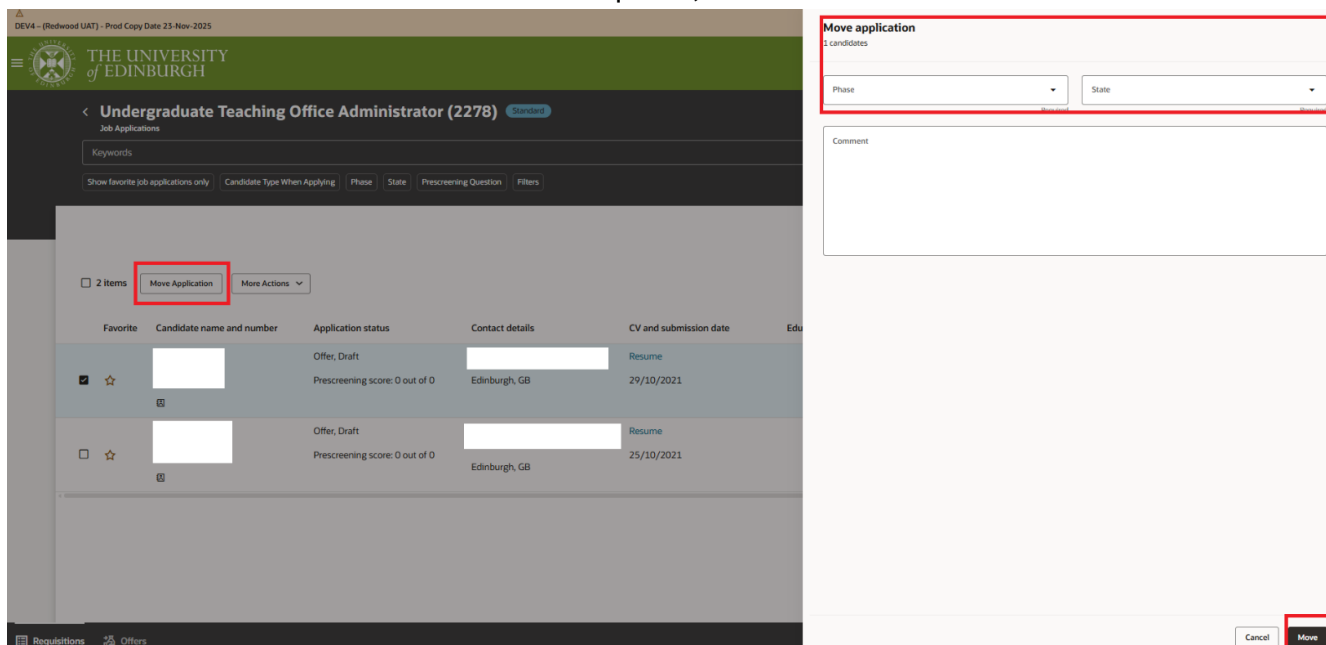
1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.



The screenshot shows the 'Job Requisitions' interface. At the top, there is a search bar and filters for Phase, State, Hiring Manager, Recruiter, Location, and Filters. Below this is a table with 6 results. The 'Applications' column is highlighted with a red box.

Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader in	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Arr	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

2. Select the candidates you wish to move and click Move Application at the top of the list, update the Phase and State and add a comment if required, then click **Move**.



The screenshot shows the 'Undergraduate Teaching Office Administrator (2278)' page. On the left, a table of candidates is visible. The 'Move Application' button is highlighted with a red box. On the right, the 'Move application' dialog box is open, showing fields for Phase, State, and Comment. The 'Move' button at the bottom right is also highlighted with a red box.

3. The candidates Application status will then be updated.

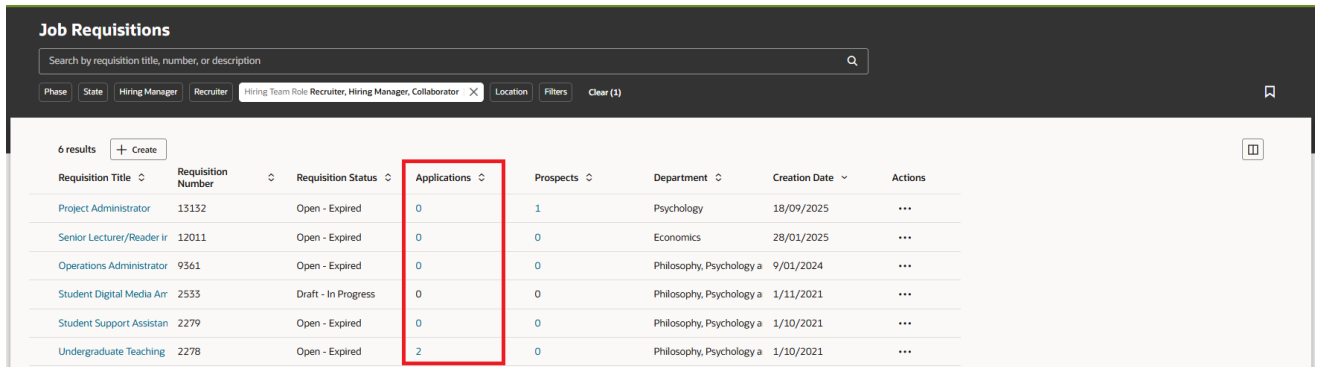
Tips

- If you bulk update the candidate phase and state **this will be visible** to the candidate, should they view their application status, therefore care should be taken if particularly if updating to an end status e.g. rejected by employer that appropriate correspondence is also sent to the candidate.
- Under GDPR, candidates can request information about their application including all notes (online

and offline). Care should therefore be taken to ensure any comments are in keeping with the principles of fairness, equality, dignity, and respect.

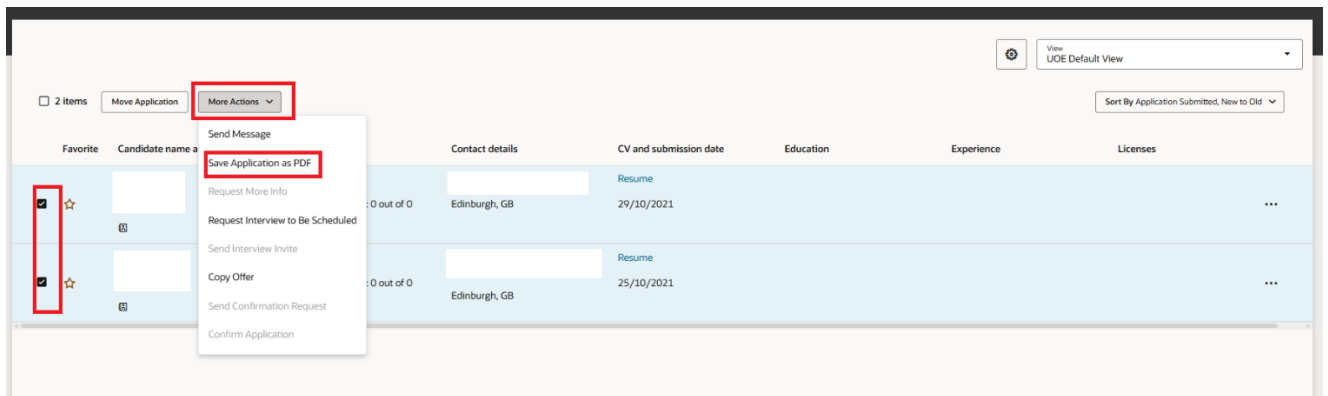
Bulk Print (Save Application as a PDF)

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.



Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13152	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader Ir	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Ar	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

2. Select the candidates you wish to bulk download and click on **More Actions**, then select **Save Application as PDF**.



2 Items Move Application More Actions

Favorite Candidate name a Contact details CV and submission date Education Experience Licenses

Send Message
Save Application as PDF
Request More Info
Request Interview to Be Scheduled
Send Interview Invite
Copy Offer
Send Confirmation Request
Confirm Application

3. Deselect any details you do not wish to include, then click **save**. You will then see an 'Action will be processed' pop up box at the bottom of the screen.

Save application as PDF

We'll handle this as a bulk process
As soon as it completes, we'll let you

What info do you want to save?

Job application details

- Key info
- Work summary
- Personal info
- Address
- Citizenship
- Endorsements
- Source info
- Tags

Candidate attachments

- Resume
- Cover letter

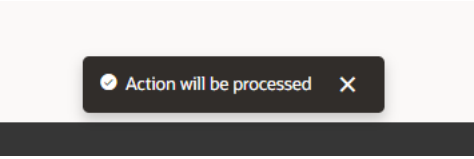
Questions

- Prescreening
- Request info
- Interview feedback

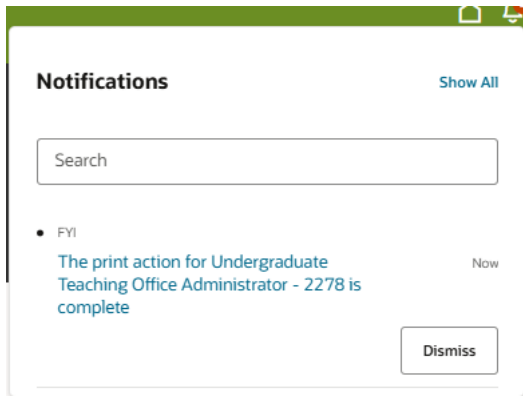
Content sections

- My Licences, Certifications and Registrations
- Education
- Work History
- Work Preferences
- Language

Cancel Save



- Once the bulk print job has completed you get a notification via the Bell Icon and an Email with the zip file containing all the applications you selected.



Tips

- You can only download in batches of up to 100.
- Miscellaneous documents added by the candidate at application stage **will not be included** in the download and will need to be downloaded individually.
- **Internal Candidates** – the download **will only include** the most recently uploaded document. If separate documents are added at the time of application for a CV and Cover Letter, only the most recently added document will download. Candidates are advised to attach all documents in a single file at the time of application. You can still view and download these documents individually within the candidate’s record (Details section).

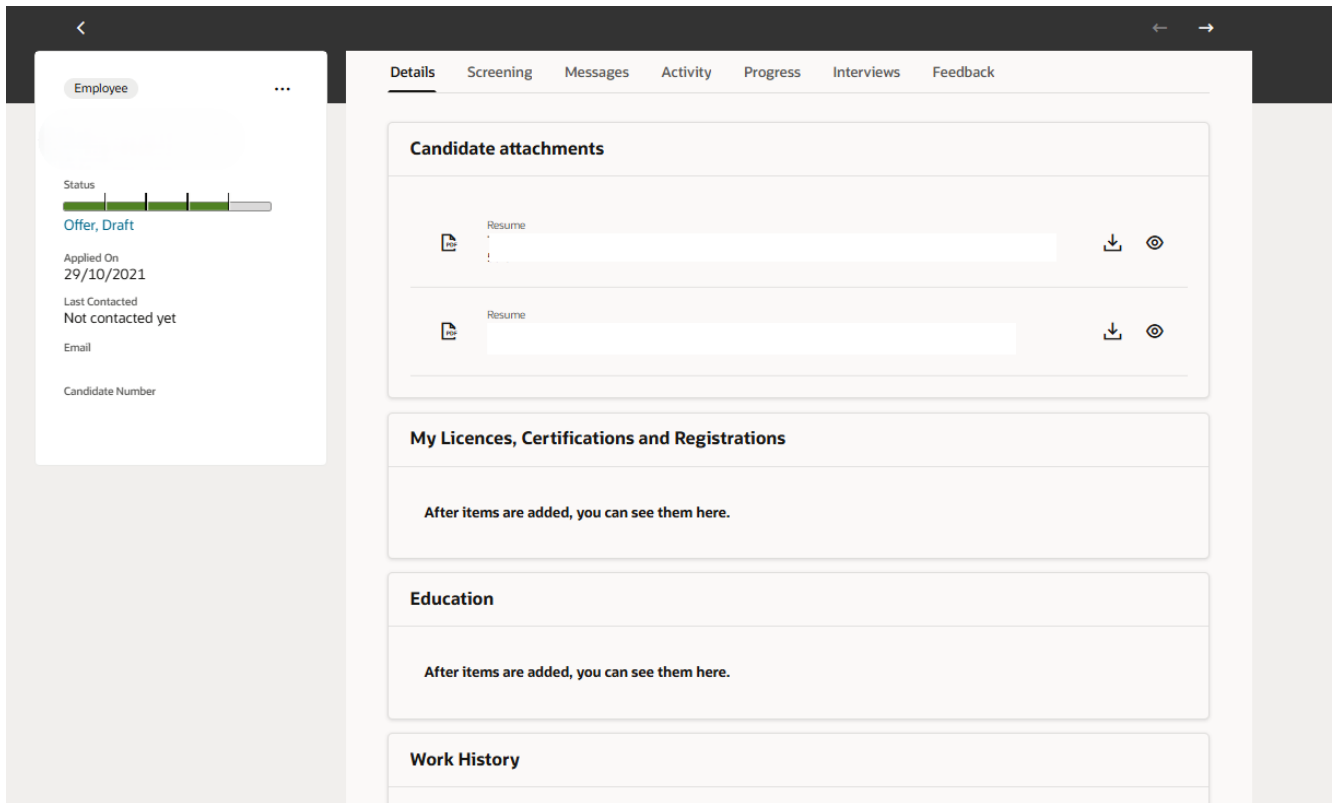
Adding Documents to a Candidates Record

There are instances where documents may be added to a candidate’s record. For example, when references are sought for the interview process or interview documents are to be added for the panel. To add any documents to the candidate’s record follow the below steps.

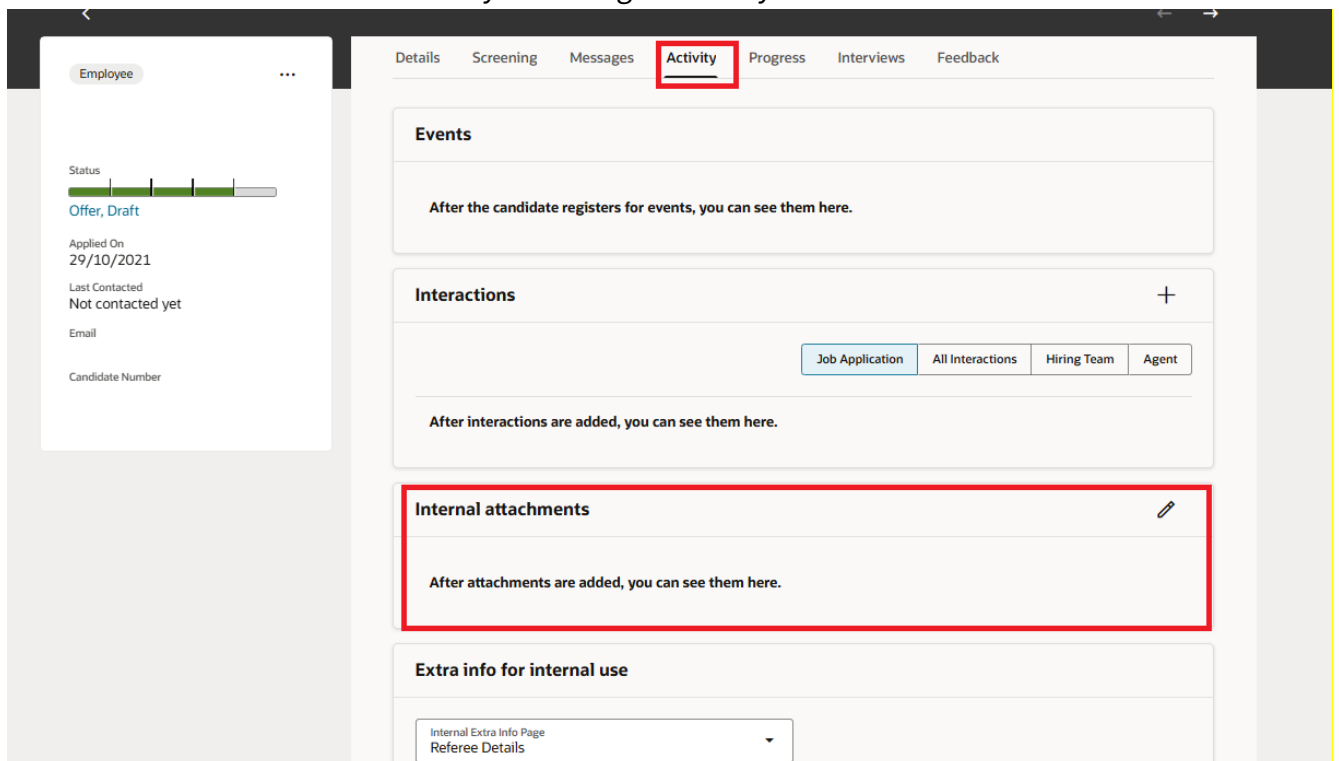
1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.

Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader ir	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9561	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Arr	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

2. From the Job Applications Screen, click on the candidate's name to view the candidate profile, then navigate to the Activity Tab, documents.



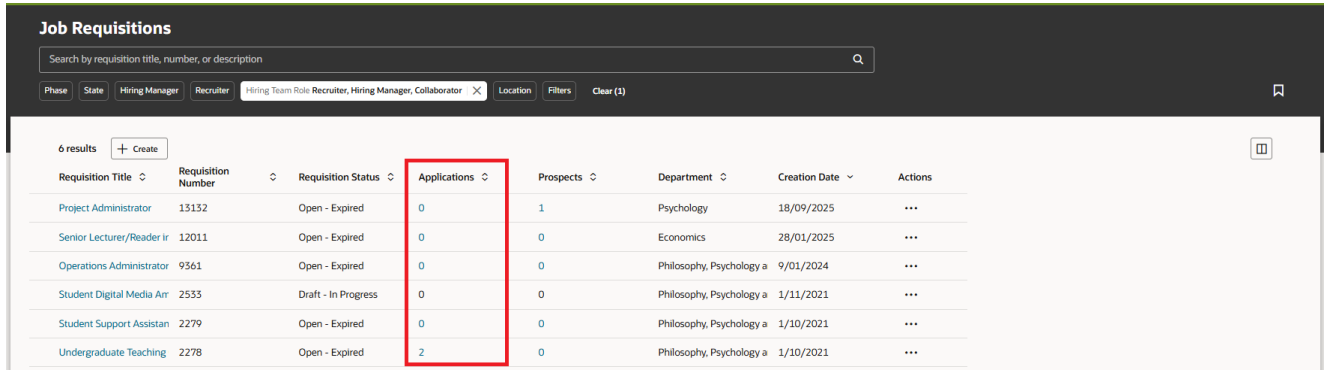
3. In the Internal Attachments section, click on the pencil icon and upload the document(s). Any documents added here are visible by the hiring team only.



Collecting Feedback after Interview

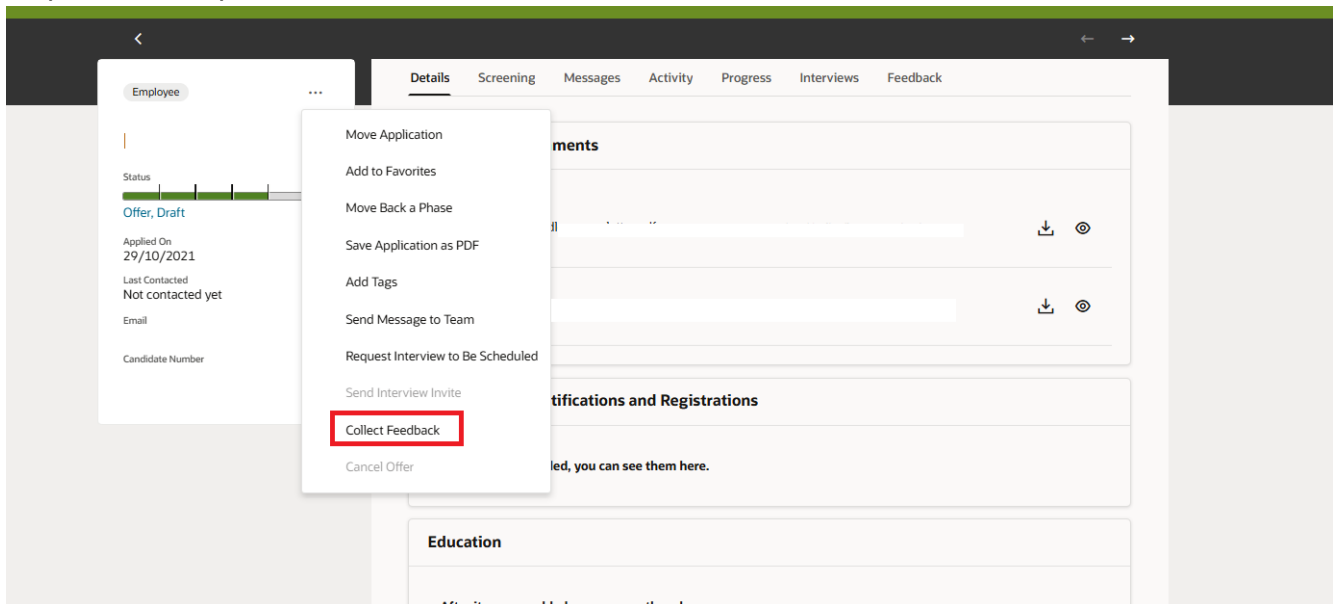
This functionality allows you to collect interview feedback from the panel. This action can only be performed at an individual candidate level and if the Interview Questionnaire was added at Job requisition creation.

1. From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.

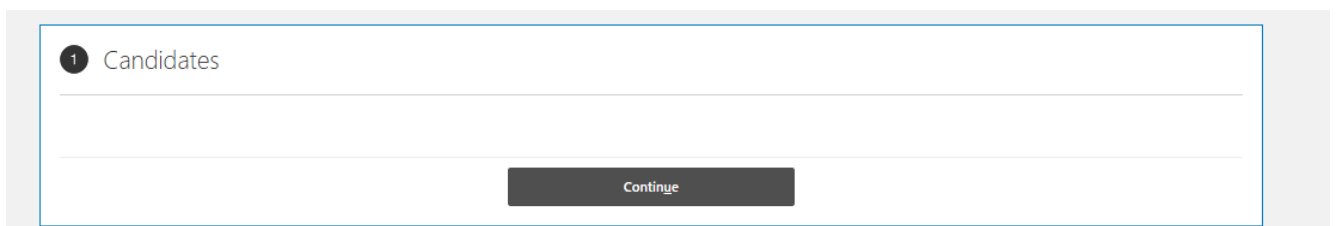


Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader Ir	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Atr	2553	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

2. Select the candidate you wish to gather feedback and on the candidate details screen select the ellipsis at the top left of the candidate details, then select **Collect Feedback**.



3. Click **continue** in the Candidates section.



4. Select the respondents from the list or add a name manually, then click **continue**.

2 Select Respondents

Add Respondent

Select a value

KY

AN

MA

AN

Continue

5. Select the **Interview Questionnaire** from the drop down, then click **continue**.

3 Select Interview Questionnaire

Add Questionnaire

Select a value

Name	Code	Folder	Owner
Interview Feedback Questionnaire	INT_FEEDBACK	Interview Feedback	

there's nothing here so far.

Continue

6. Ignore Include Documents – this is not required, unless you wish to attach any of the documents listed with the request, then click continue.

4 Include Documents

Include Resume

Include Cover Letter

Include Miscellaneous Attachments

Include Internal Documents

Continue

7. Request Details – amend the expiration date and time as required and add a note for respondents. You do not need to tick ‘Request a Rating from respondent’.

5 Request Details

*Expiration Date

16/12/2025 4.07.PM

Enter a date on or after 2/12/2025 12.00.AM.

Note to Respondents

Request Rating from Respondent

8. Then click **Submit** at the top of the screen.

- When the respondents have completed the interview feedback questionnaire, you will receive an email and notification on the Bell icon. This can also be viewed in the Feedback tab of the candidate's record.

How to Reject Candidate(s)

Please note that this is a **two-step process**; you should send an email using the templates provided to the unsuccessful candidate(s) **before** updating the phase and state.

- From the Hiring App select the requisition you wish to review, clicking on the number from the Applications Column to take you to the candidate list.

Requisition Title	Requisition Number	Requisition Status	Applications	Prospects	Department	Creation Date	Actions
Project Administrator	13132	Open - Expired	0	1	Psychology	18/09/2025	...
Senior Lecturer/Reader Ir	12011	Open - Expired	0	0	Economics	28/01/2025	...
Operations Administrator	9361	Open - Expired	0	0	Philosophy, Psychology a	9/01/2024	...
Student Digital Media Arr	2533	Draft - In Progress	0	0	Philosophy, Psychology a	1/11/2021	...
Student Support Assistan	2279	Open - Expired	0	0	Philosophy, Psychology a	1/10/2021	...
Undergraduate Teaching	2278	Open - Expired	2	0	Philosophy, Psychology a	1/10/2021	...

- Select the candidate(s) you wish to send a message to and click **More Actions** and select **Send Message**.

Favorite	Candidate name a	Contact details	CV and submission date	Education
<input checked="" type="checkbox"/>	[Redacted]	Edinburgh, GB	Resume 29/10/2021	
<input checked="" type="checkbox"/>	[Redacted]	Edinburgh, GB	Resume 25/10/2021	

- A send message box will appear on the right of the screen. In the Template field choose from the appropriate template:
 - Reject after sift – External (for external candidates)
 - Reject after sift – Internal Rejection (for internal candidates)
 - Rejection after Interview – External Candidate

- Rejection after Interview – Internal Candidate
- Select Blank Message to create your own
- Preview the message before clicking send, you can edit this if you wish.
- **Please DO NOT use the Tokens functionality**

Send message

2 candidates

Template
Blank Template
▼

Blank Template

Reject after sift - External

Reject after sift - Internal

Rejection after interview - External candidate

Rejection after interview - Internal candidate

Your message

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A[±] ▼
B
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☒
A²
A,
A ▼
A ▼
☰ ▼
⋮

Required

Attachments

Drag and Drop

Select or drop files here.

Cancel

Preview

Send

6. Return to the Requisition candidate list to update the Phase (e.g. Screening) and State to **Rejected by Employer**. Select the candidates, then click on more actions, update the phase and state and add a comment if required, then click **Move**.

The screenshot displays the 'Move application' interface for 2 candidates. It features three dropdown menus at the top: 'Phase' set to 'Screening', 'State' set to 'Rejected by Employer', and 'Reason' set to 'Knowledge, skills and experience below minimum requirement'. Below these is a scrollable list of reasons, with the selected reason highlighted in blue. At the bottom right, there are two buttons: 'Cancel' and 'Move', with the 'Move' button highlighted by a red box.

Move application
2 candidates

Phase
Screening

State
Rejected by Employer

Reason
Knowledge, skills and experience below minimum requirement

- Failed minimum eligibility criteria
- Incomplete Application
- Inviting for another role
- Knowledge, skills and experience adequate but not best
- Knowledge, skills and experience below minimum requirement**
- Near miss candidate - met all criteria but stronger candidates
- Qualifications adequate but not best
- Qualifications below minimum requirement

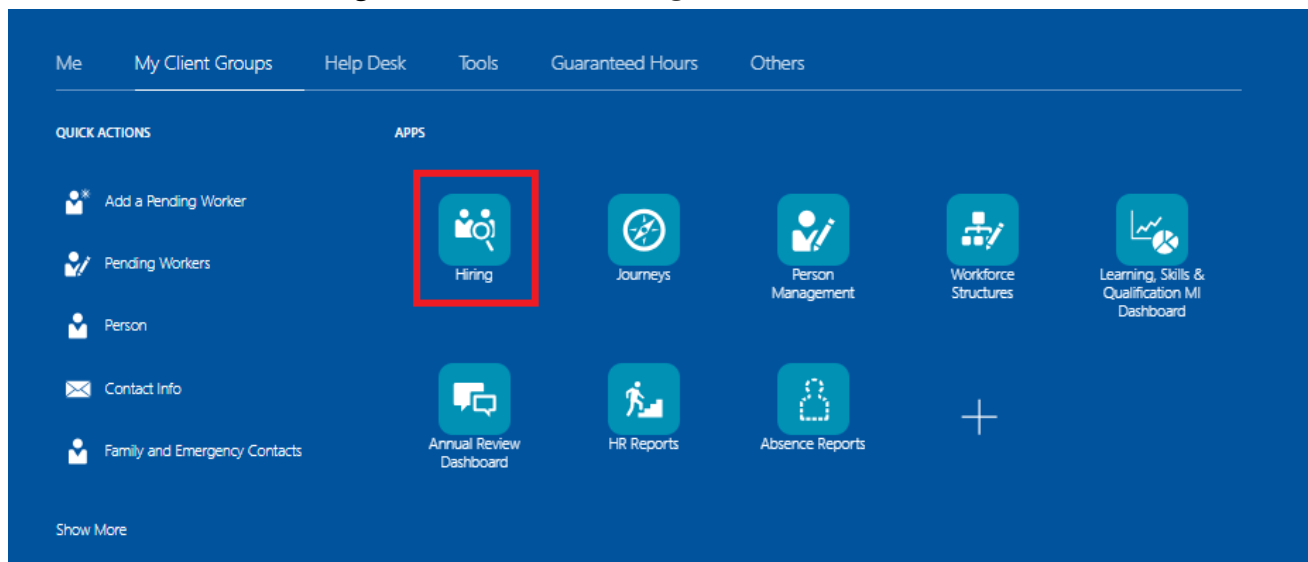
Cancel Move

7. The candidates Application status will then be updated and will be viewable by the candidate.

Navigating the Hiring App – Offers

The offers section shows all Job Offers by state (drafted, accepted, withdrawn etc). Please read the separate guide [‘How to create and Manage a Job Offer’](#) for full details on how to draft, extend, and manage job offers.

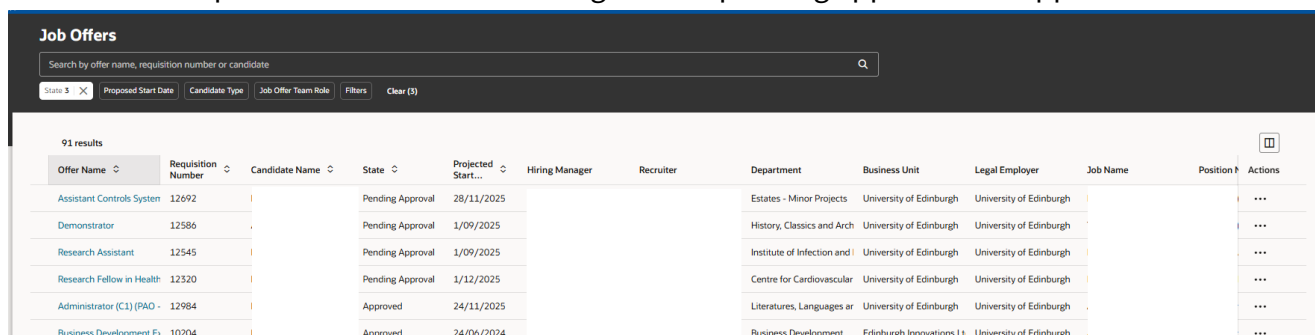
1. From the People and Money homepage select **My Team** (if accessing as a Line Manager) or **My Client Groups** (if accessing as an SDA), then **Hiring**.



2. The landing page will default to Job Requisitions and will display all requisitions you are a hiring manager, recruiter or collaborator for. From here, navigate to **Offers** at the bottom of the page.



3. The search function and filters at the top of the screen can be used to create a preferred default view. The example below shows a filter using state of pending approval and approved.



The screenshot shows the 'Job Offers' page with a search bar and filter tabs. The filter tabs include 'State 3', 'Proposed Start Date', 'Candidate Type', 'Job Offer Team Role', and 'Filters Clear (5)'. Below the search bar is a table with 91 results. The table has columns for Offer Name, Requisition Number, Candidate Name, State, Projected Start Date, Hiring Manager, Recruiter, Department, Business Unit, Legal Employer, Job Name, Position, and Actions.

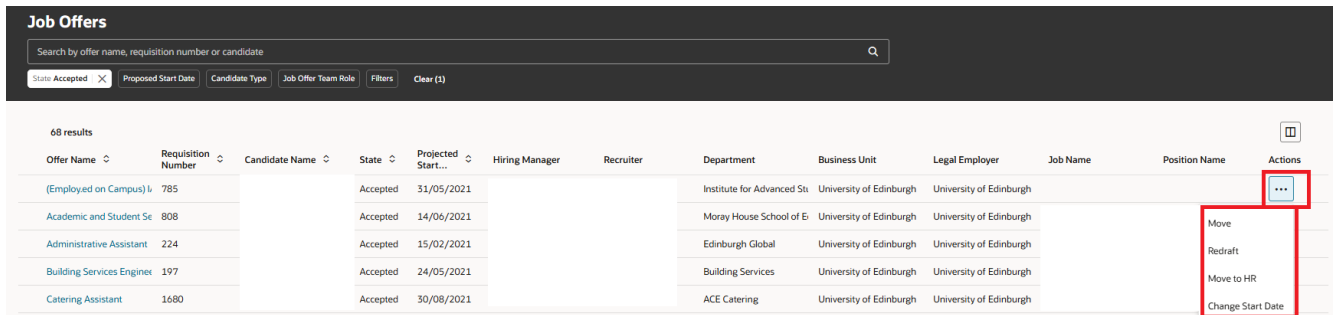
Offer Name	Requisition Number	Candidate Name	State	Projected Start...	Hiring Manager	Recruiter	Department	Business Unit	Legal Employer	Job Name	Position	Actions
Assistant Controls System	12692		Pending Approval	28/11/2025			Estates - Minor Projects	University of Edinburgh	University of Edinburgh			...
Demonstrator	12586		Pending Approval	1/09/2025			History, Classics and Arch	University of Edinburgh	University of Edinburgh			...
Research Assistant	12545		Pending Approval	1/09/2025			Institute of Infection and	University of Edinburgh	University of Edinburgh			...
Research Fellow in Health	12320		Pending Approval	1/12/2025			Centre for Cardiovascular	University of Edinburgh	University of Edinburgh			...
Administrator (C1) (PAD -	12984		Approved	24/11/2025			Literatures, Languages ar	University of Edinburgh	University of Edinburgh			...
Business Development Es	10204		Approved	24/06/2024			Business Development	Edinburgh Innovations Lt	University of Edinburgh			...

4. There are a number of columns of information you can view by using the scroll bar underneath the offer list, you can customise these by clicking on the customise columns icon and then selecting the columns you would like to view. Your column order and selection will be saved (i.e. if you log out or open a new tab, your preferred view stays how you left it). If you can't see all of the columns

press Shift + scroll on your mouse to view.



5. **Actions** appear at the end of all the columns as a static field. Click on the ellipsis (3 dots) to take action on the Offers, the action you can take will vary depending on the state of the offer.



Appendix

Appendix 1 – Job Requisition Approval Phases and States

When a job requisition is being created there are a number of phases and states, below highlights these and a short description.

Phase	State	Description
Open	Filled	Candidate has been appointed to job requisition and is moving through recruitment process
	Expired	Job requisition has closed but has not yet been appointed to
	Cancelled	Job requisition was created and advertised, but has been cancelled
	Not Posted	Job requisition was created but advert not yet advertised
	Posted	Job requisitions currently posted on careers site
	Suspended	Job requisition was suspended
	Unposted	Job requisition was opened and posted but advertising has been halted
Approval	Cancelled	Approval process was halted
	Deleted	Requisition was deleted at approval stage
	Pending	Submitted for approval, awaiting response
	Approval Rejected	Rejected by approver
Draft	Deleted	Draft job requisition was deleted
	In Progress	Draft job requisition in progress
Job Formatting	Cancelled	Job requisition was cancelled during job formatting phase
	In Progress	Approved and sent to HR Operations for checking
Posting	Cancelled	Job requisition was posted and cancelled
	In Progress	Job requisition will be posted

Appendix 2 - Recruitment Phases and States

The table below shows each in system recruitment phase (stage in process) and state (step within that stage).

PHASE 1	States	PHASE 2	States	PHASE 3	States	PHASE 4	States	PHASE 5	States
New	To be reviewed	Screening	To be reviewed	Interview	1st interview to be scheduled	Offer	Verbal offer made	HR	Pending Automated Processing
	Request Further Information		Reviewed		1st interview scheduled		On hold		Pending Manual Processing
	Further Information requested		Screening to be scheduled		Assessment to be scheduled		To be Created		Error during Processing
	Under consideration		Screening scheduled		Assessment scheduled		Draft		Processing in Progress
	Selected for screening		Screening completed		Awaiting interview/Assessment outcome		Pending Approval		Processed
	Rejected by Employer		Additional assessment to be scheduled		Panel feedback requested		Approval Rejected		Rejected by Employer
	Withdrawn by Candidate		Additional assessment scheduled		Panel feedback received		Approved		Withdrawn by Candidate
			Additional assessment complete		Selected for offer		Extended		
			Progress to interview		Did not attend interview		Accepted		
			On Hold		2nd Interview to be scheduled		In negotiation		
			Selected for offer		2nd Interview scheduled		Rejected by Employer		

			Rejected by Employer		On hold		Withdrawn by Candidate		
			Withdrawn by Candidate		Reserve				
					Rejected by Employer				
					Withdrawn by Candidate				

Version History

Version	Date	Description	Approved By
1.0	15/12/25	First Version for publication	ME/SK
1.1	17 February 2026	Enhanced guidance on column order and selection.	HH/RM 18/02/2026
2.0	22 June 2026	Updated screen shot for filters on Page 7 Redwood Qtly update	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.