THE UNIVERSITY of EDINBURGH

System User Guide

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

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## Contents






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## Introduction

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

Guide to Recruitment and Onboarding

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

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

There are two types of interviews:

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

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

- In Person
- Phone
- Web conference

This guide covers How to schedule and manage candidate managed interviews. For details of how to set up hiring team managed interviews please refer to the guide 'How to schedule and manage hiring team managed interviews'.

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

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

If the candidate cancels their interview and does not plan to reschedule, the state should be updated to '**Withdrawn by Candidate'.** Candidates can also withdraw applications themselves, hiring teams would receive a notification.

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

Create Interview Schedule → Add Timeslots → Invite Candidate(s) → Update Candidate Status

# 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.

## Create an Interview Schedule

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

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

3. Click the **Interviews** tab.

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

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

6. **New Interview Schedule** screen, complete the required fields. Select ‘Candidate’ in **Who will schedule the interview.** Add appropriate **Location Details** (or phone number and extension for a phone interview, and phone number or web conference link and/or access code for a web conference interview). Then click **Continue**.

7. **Configure Schedule.** Complete the required fields

8. Check the configure schedule details, then click **Continue**.

9. **Add interview resources.** Here you can add additional details for the candidate, guidelines for the interviewers and resources for the interviewers. Then click **Continue.**

10. **Add time slots.** Click on **+Add** to open the add time slot screen, complete all required fields, and click on **Add**. Note - You cannot schedule the same time slots over multiple days. You must set up the timeslots for each day in separate actions. For example, create your slots for a Monday with a start and end time and then a separate one for the Tuesday.

11. **Click Submit** once you have added all the slots you need, this will return you to the Job requisition Interview tab.

## How to make changes to an Interview Schedule or add, amend or delete timeslots

1. Within the **Hiring App**, find the requisition you want add slots to.

2. Click the **Interviews** tab.

3. Select the interview schedule you have previously created.

4. Click on the **pencil icon** to edit any of the schedule details.

5. To add timeslots, navigate to the **Interviews Tab** and click on **+Add Timeslots** and complete as required.

6. If you need to **edit or delete** any of the slots click on the slot and then the ellipsis on the right hand side of the screen to edit or delete. If there are already candidates booked in to the slots, the "Cancel Interview" option will appear, you should cancel before deleting. Both the candidate and the interviewer(s) will receive a notification to confirm the cancellation.

## How to Invite a Candidate(s) 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. Click on the **number of applications** for the correct job requisition.

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

4. Then select **Send Interview Invite**.

5. Select the candidate managed interview you have created, then click **Submit.**

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

7. Once the candidate has booked a slot you will receive a notification.

## Cancelling or Rescheduling an Interview

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**.

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. Select the appropriate candidate.

5. Select the **Interviews** tab then click on the ellipsis (3 dots) and select **Cancel Interview.** The Candidate and hiring team will receive a notification.If you want to **Reschedule** the interview click on **'Send Invitation to Reschedule'**. In this scenario you should have already checked that you have available

slots for them to book.

## How to Update the Candidate Status

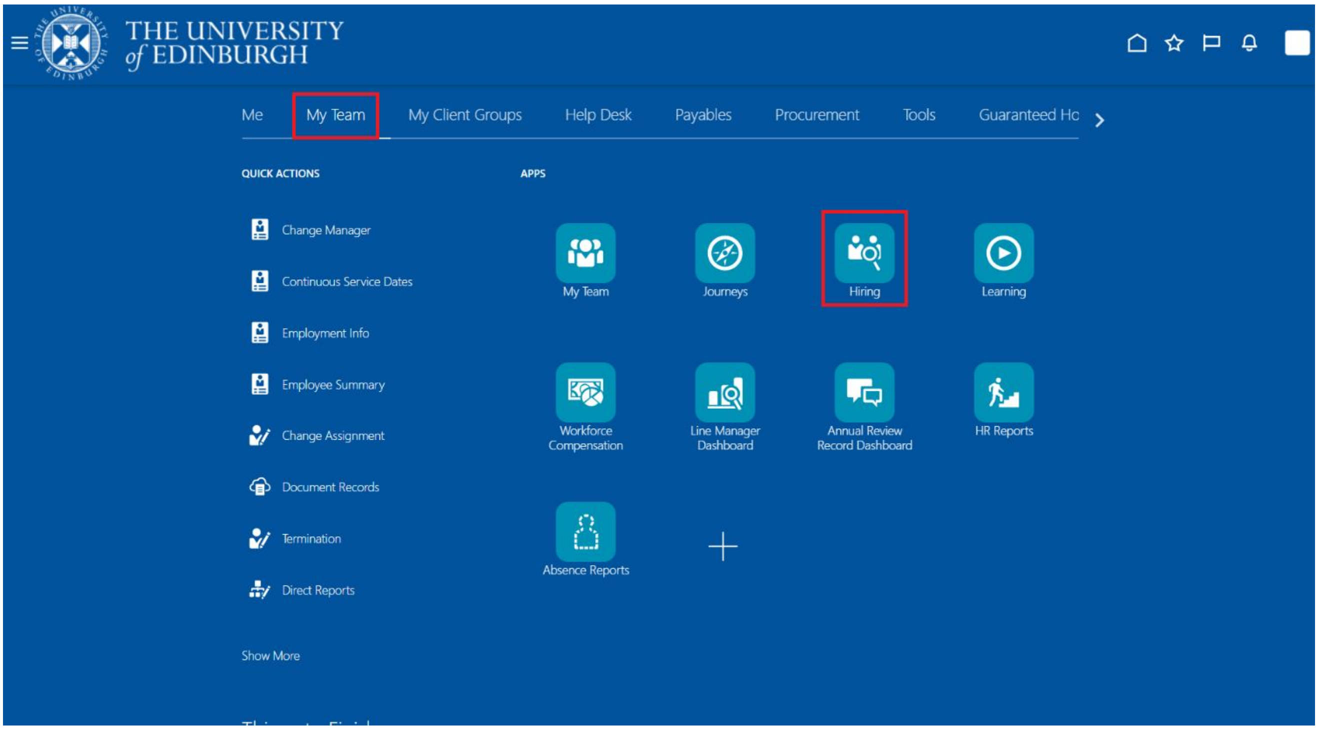
1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.
2. There are two tabs at the bottom of the screen: Requisitions and Offers. Ensure the **Requisitions** tab is selected and search for the job requisition using the requisition title, number or description. Click on the **number of Applications**.
3. From the **job applications** screen select the **checkbox** next to the candidates' name, click on the **Move Application** button.
4. Use the **Phase** dropdown to select **Interview**.
5. Then use the **State** dropdown to select **1st Interview Scheduled** then click the **Move** button.
6. If the candidate cancels an interview and does not plan to reschedule, ensure you update the state to **Withdrawn by Candidate.**

# In Detail

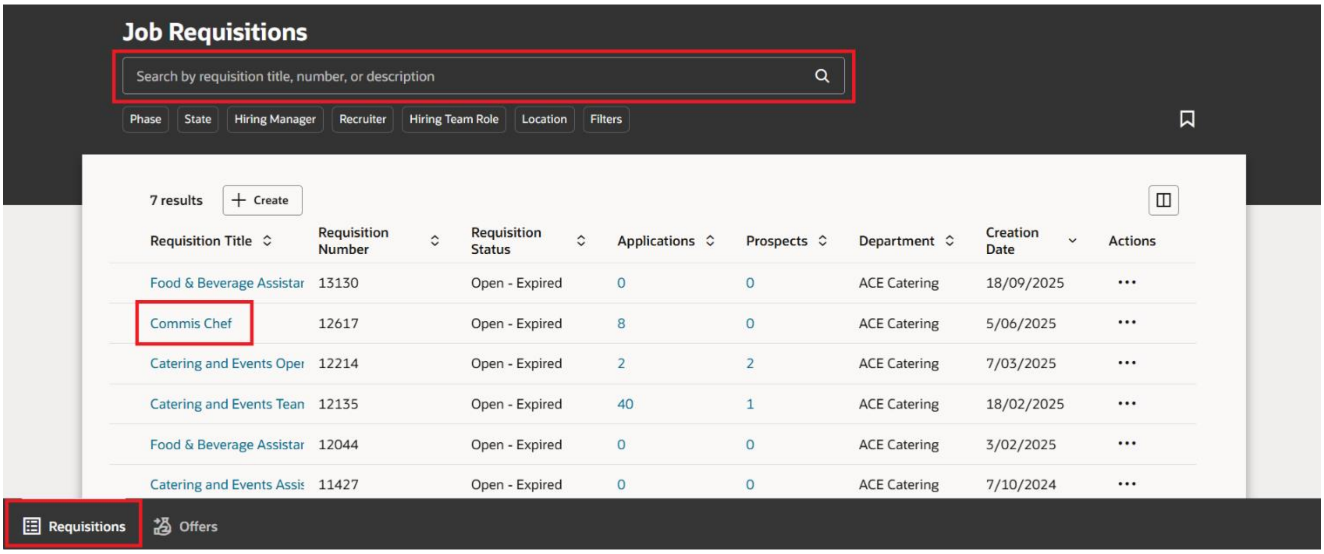
This section provides the detailed steps and includes relevant screenshots from the system.

## Create an Interview Schedule

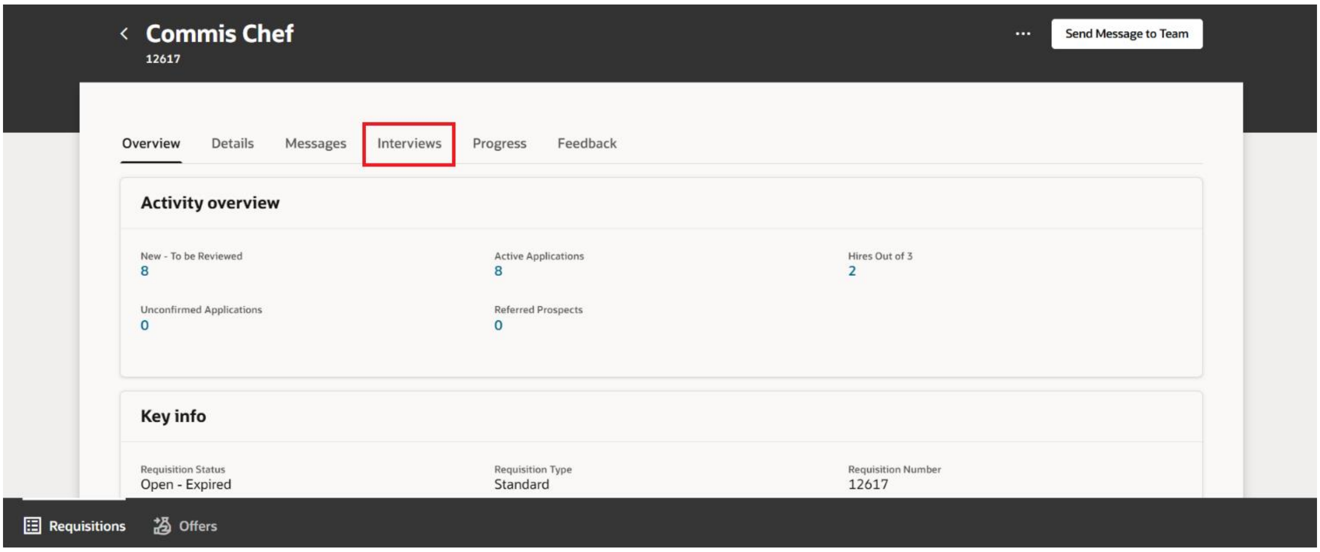
1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.



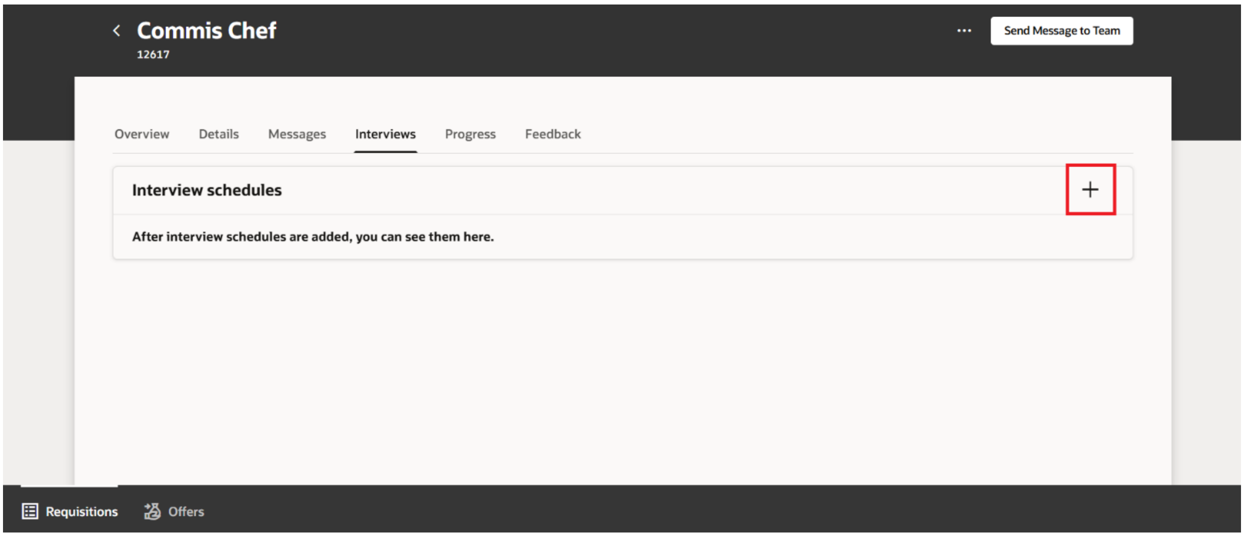

2. There are two tabs at the bottom of the screen: Requisitions and Offers. Ensure the **Requisitions** tab is selected and search for the job requisition using the requisition title, number or description. Click on the job requisition name to open it.



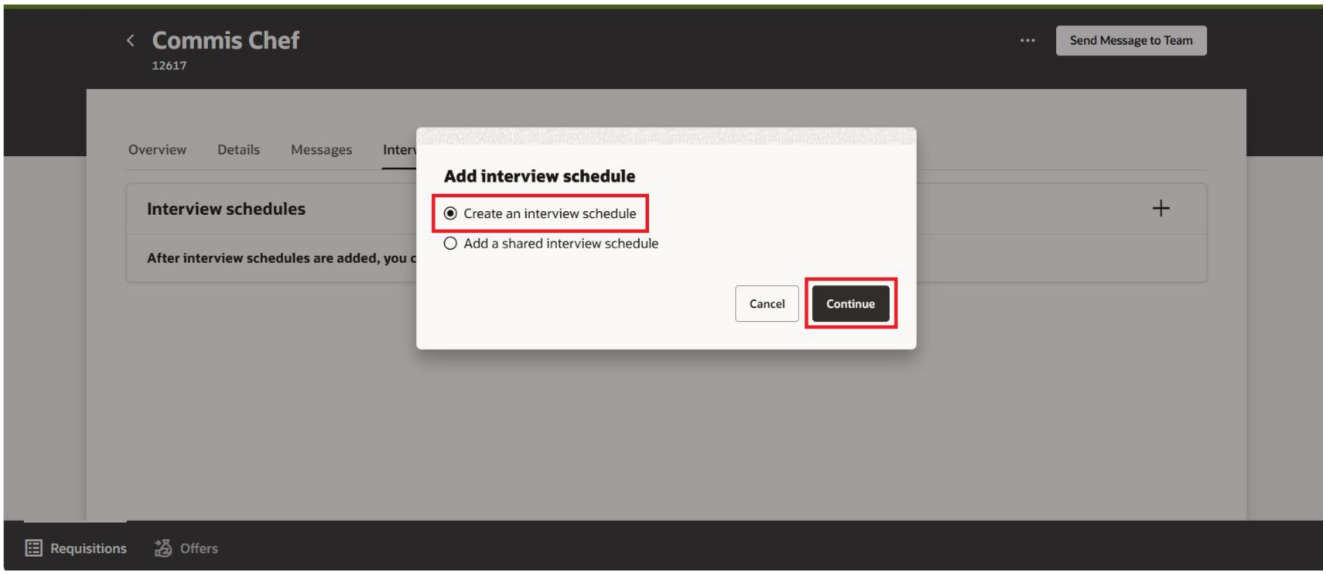
3. Click the **Interviews** tab.




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




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




6. **New Interview Schedule** screen, complete the following fields:

- Who will schedule the interview – **Candidate.**
- Template – select the appropriate template from the dop down menu.

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

- Schedule Title – will default from the template used. 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.
- Schedule Owner – will default to the person creating the interview, this can be amended here or later if required.

**What are the details of this interview section** (the screen shot is for 'In Person', the screens will vary depending on the template selected above)

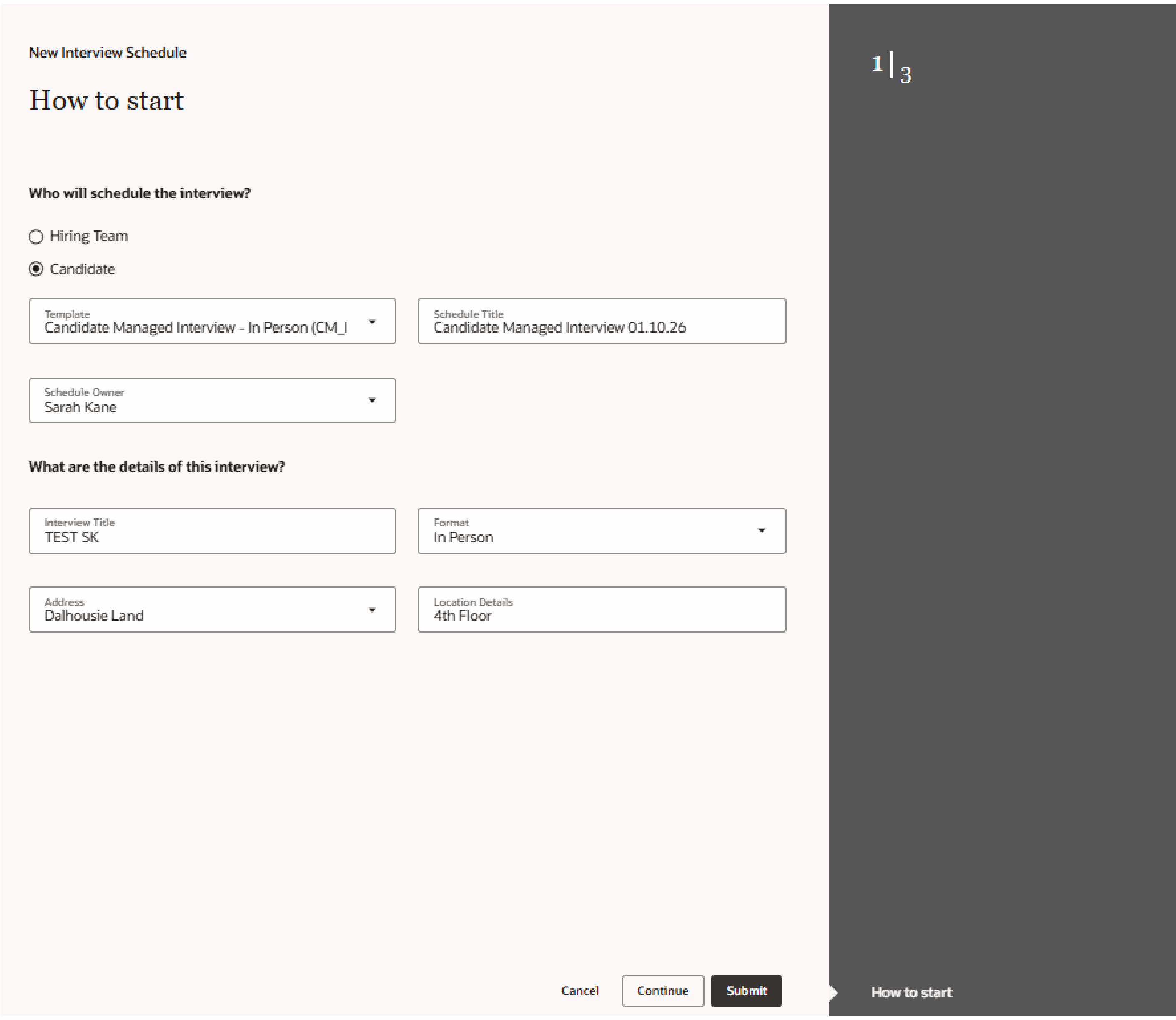
- Interview title – give this a meaningful title
- Format - Select from the drop down
- Address
- Location Details

**Tips**

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

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

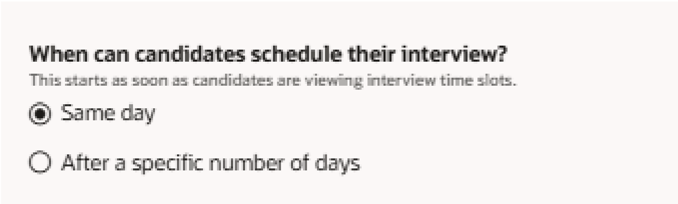
For web conference interviews enter a **phone** number or **web conference link** and/or **access code** can be added.




Now click **Continue** to go to the Configure Schedule screen.

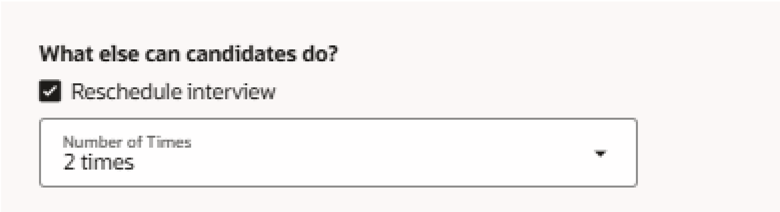
7. **Configure Schedule**. Complete the following fields:

   **When can candidates schedule interview**? Select Same day or after a specific number of days after the interviews are viewable.

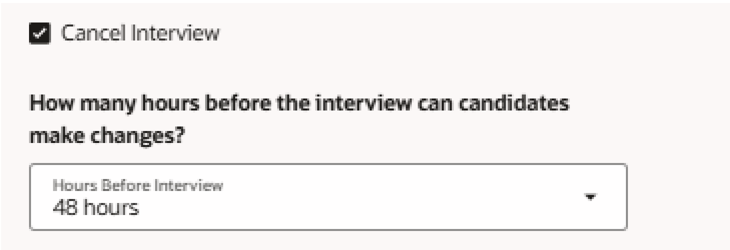



**What else can candidates do?**

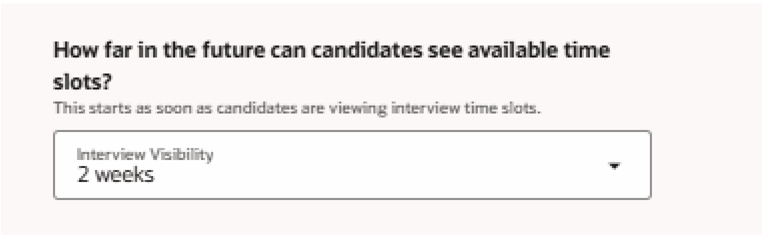
a. Tick the **Reschedule Interview Box** to limit the amount of times a candidate can reschedule an interview using the options here as needed.



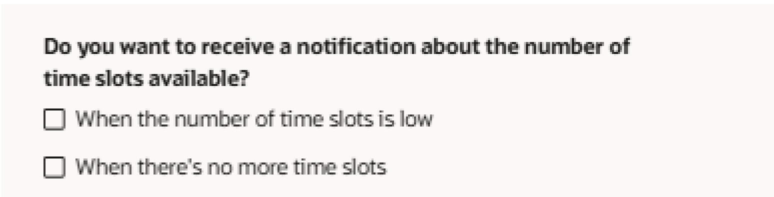

b. Tick the **Cancel Interview Box** and select the number of hours before a candidate can make changes.



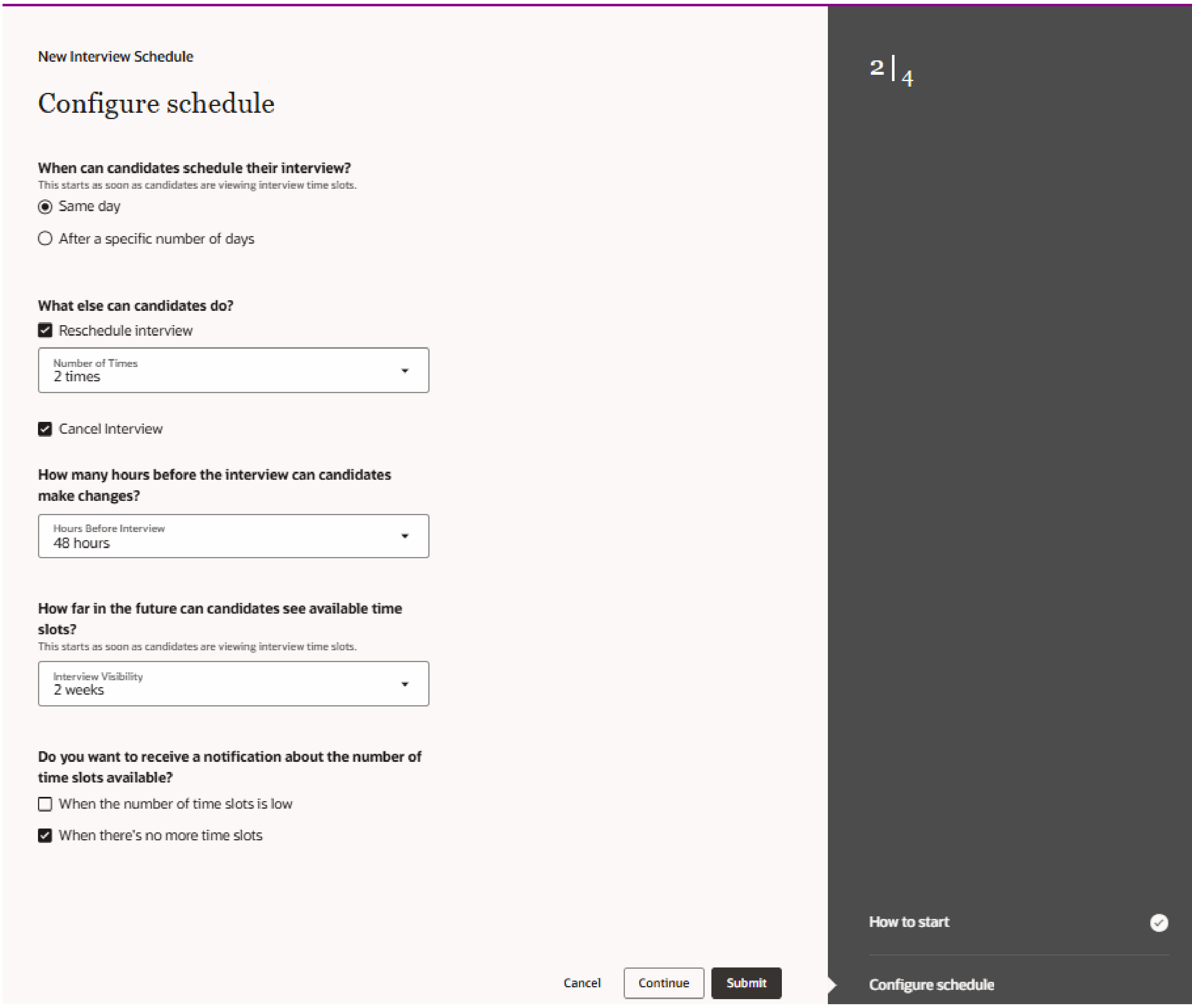

c. Select **How far in the future can candidates see available time slots**?




d. Select **Do you want to receive a notification about the number of time slots available**?




8. Check configure schedule and click **Continue.**



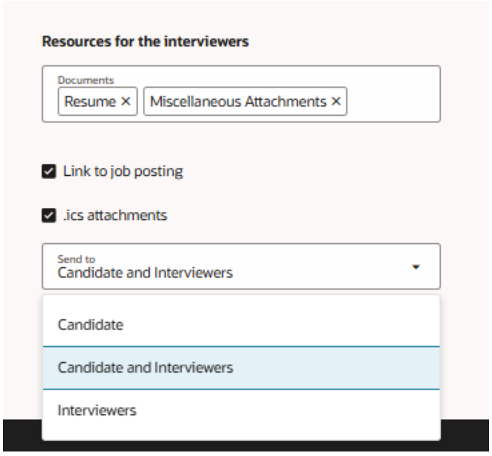

9. **Add Interview Resources**. In this section you can provide additional details for the candidate, guidelines for the interviewer(s) and resources for the interviewer(s).

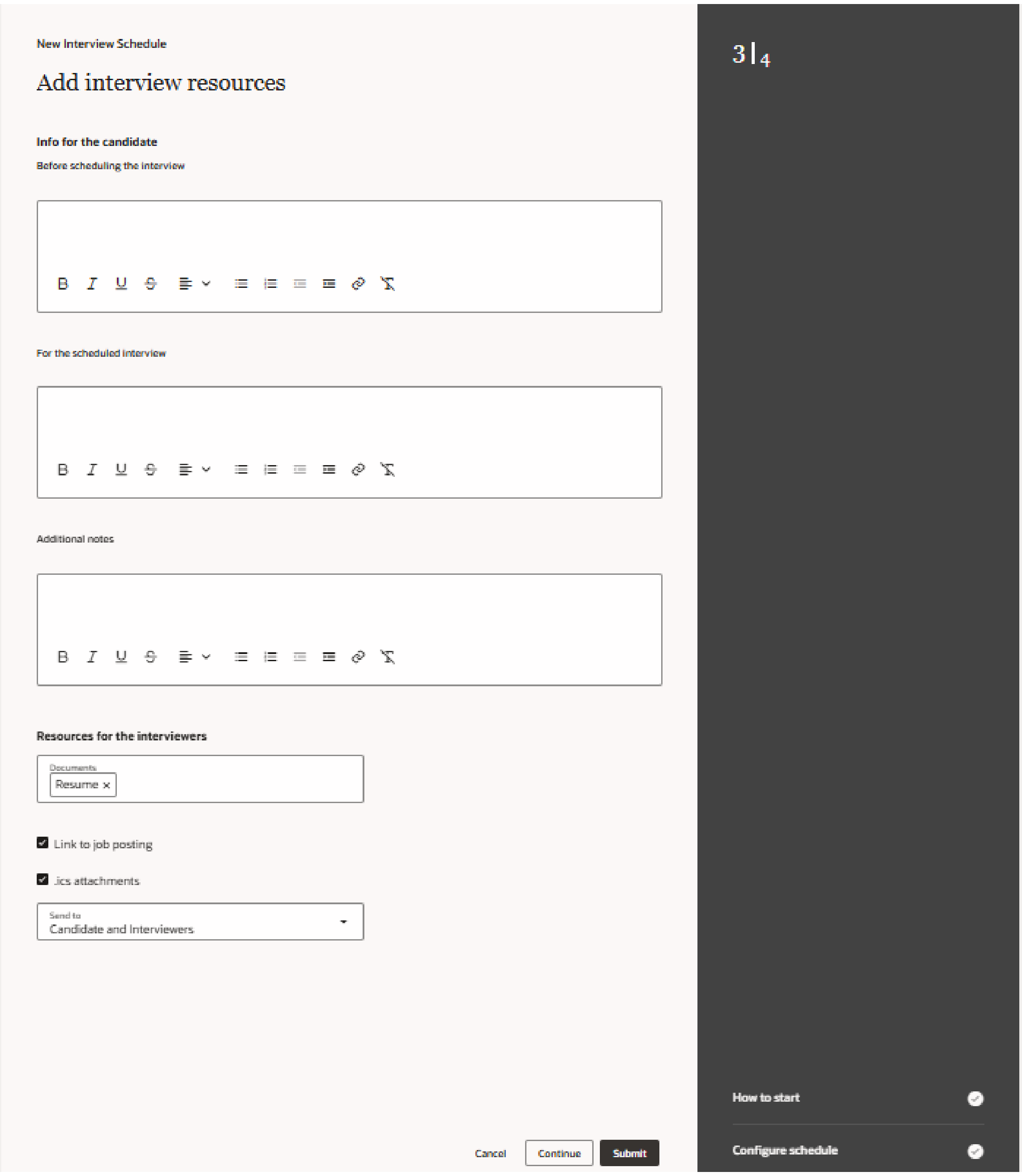
- Within the section **'Info for the candidate**' the details you enter within the '**For the Scheduled Interview'** and **'Additional Notes'** will also appear in the notification sent to the candidate inviting them to attend the interview.

- **Resources for the Interviewers** will default to resume but others can be added, e.g. cover letter. A link to these documents will be included in the notification sent to the hiring team to access. Then click **continue**.

**Tips**

You can also opt in and select to send any of the documents and the .ics attachments (to add to calendar) to the candidate, candidate and interviewer(s) or just the interviewer.



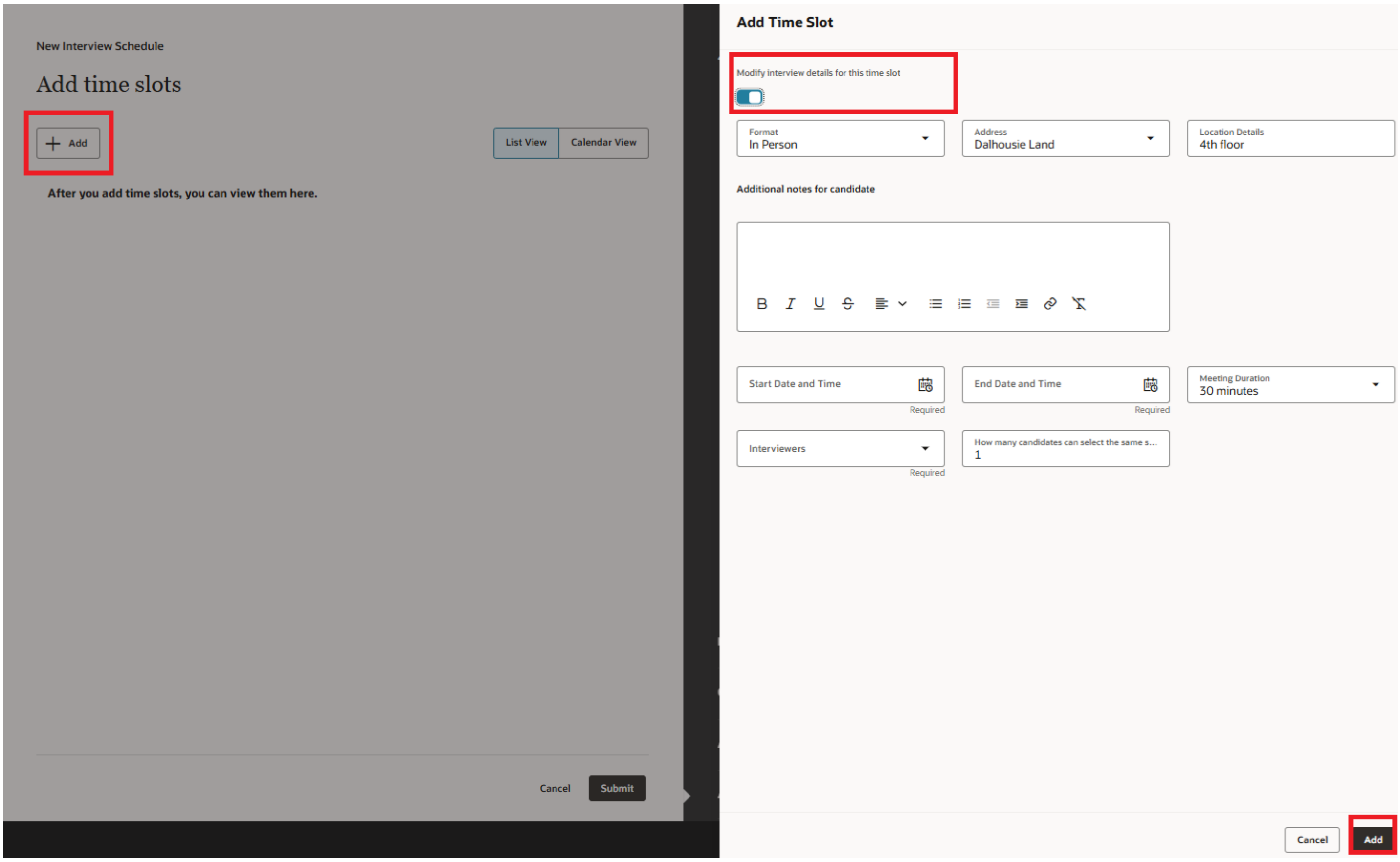



10. **Add time slots.** Click on +Add to open the add time slot screen on the right hand side.

**Note -** You cannot schedule the same time slots over multiple days. You must set up the timeslots for each day in separate actions. For example, create your slots for a Monday with a start and end time and then a separate one for the Tuesday.

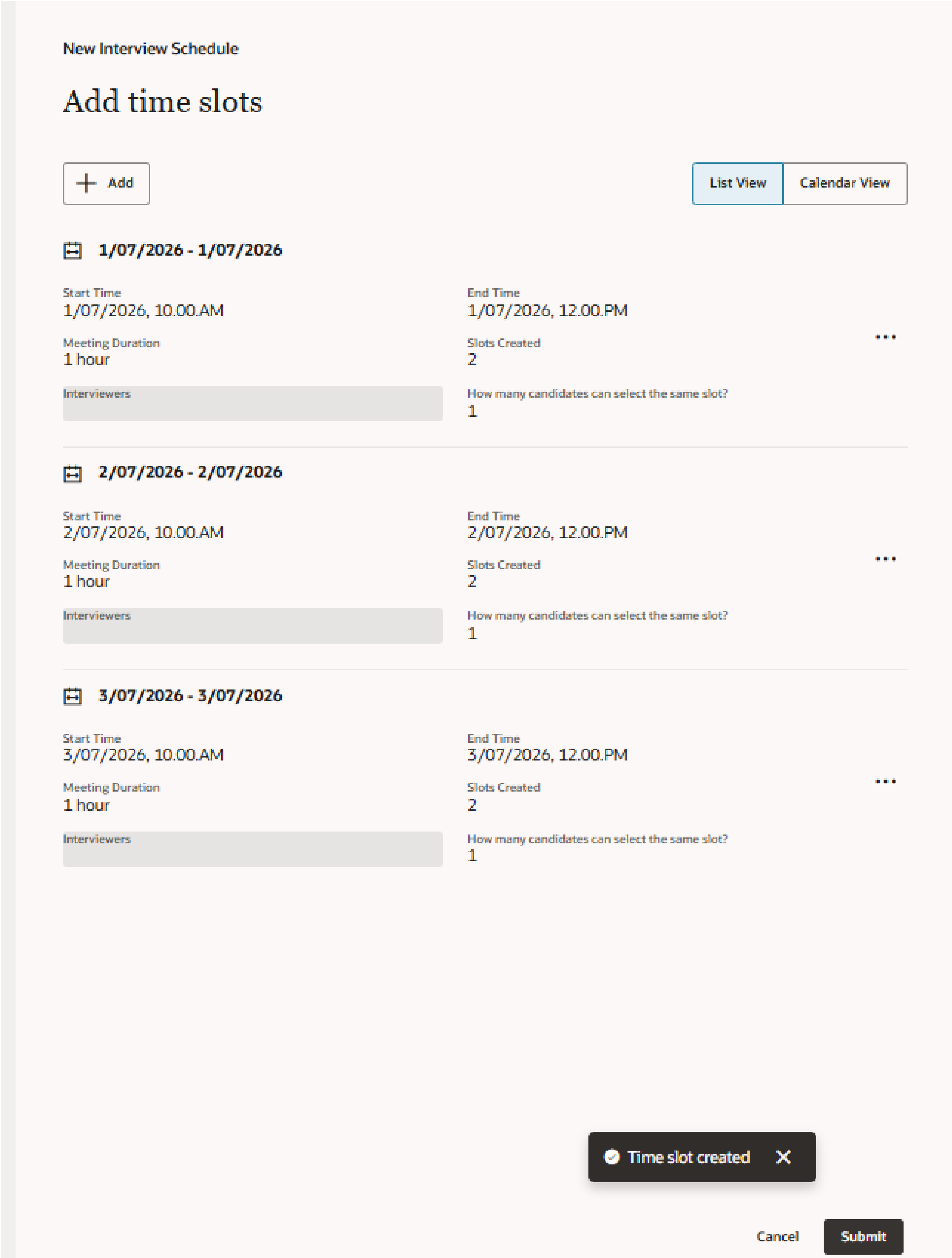
- Select the **Modify Interview details** for this time slot to view the details and amend if required.
- Add a start date and time (note you will not see the time zone here).
- Add an end date and time.
- Meeting duration – how long the interview will last.
- Interviewers – search for and select the interviewers to add.

- How many candidates can select the same time slot.

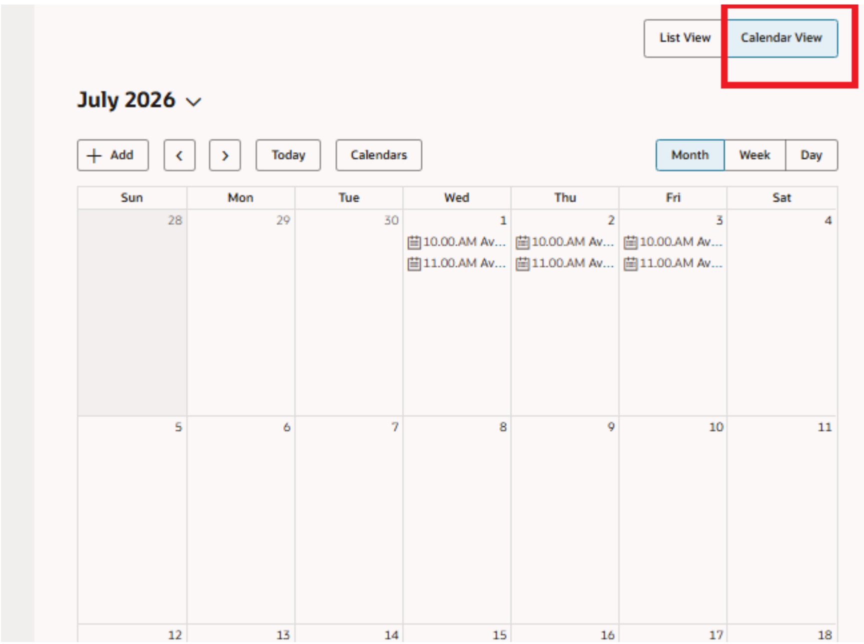



11. Click Add, you can now view the schedule within the list view or calendar view on screen.

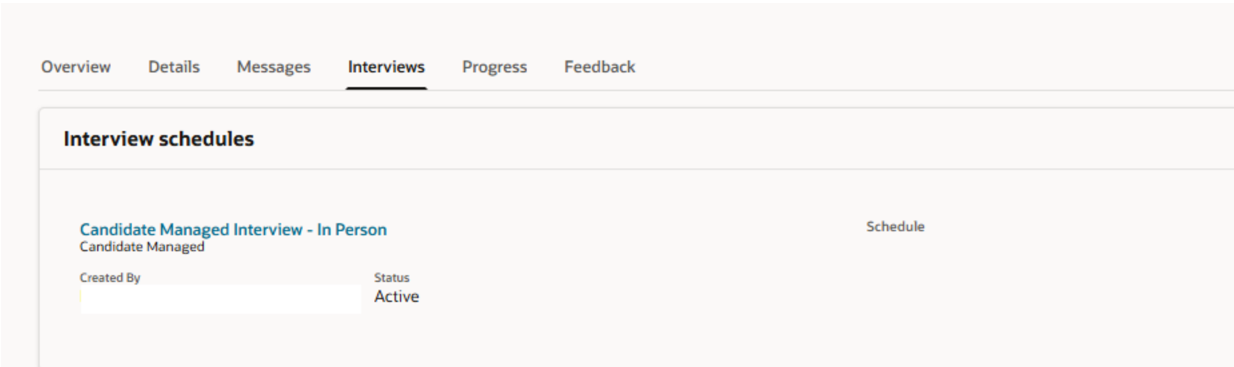
The example below shows time slots created for the same times (10am-12pm) on 3 separate days.




You can also view the slots in a calendar view by selecting that at the top of the screen.

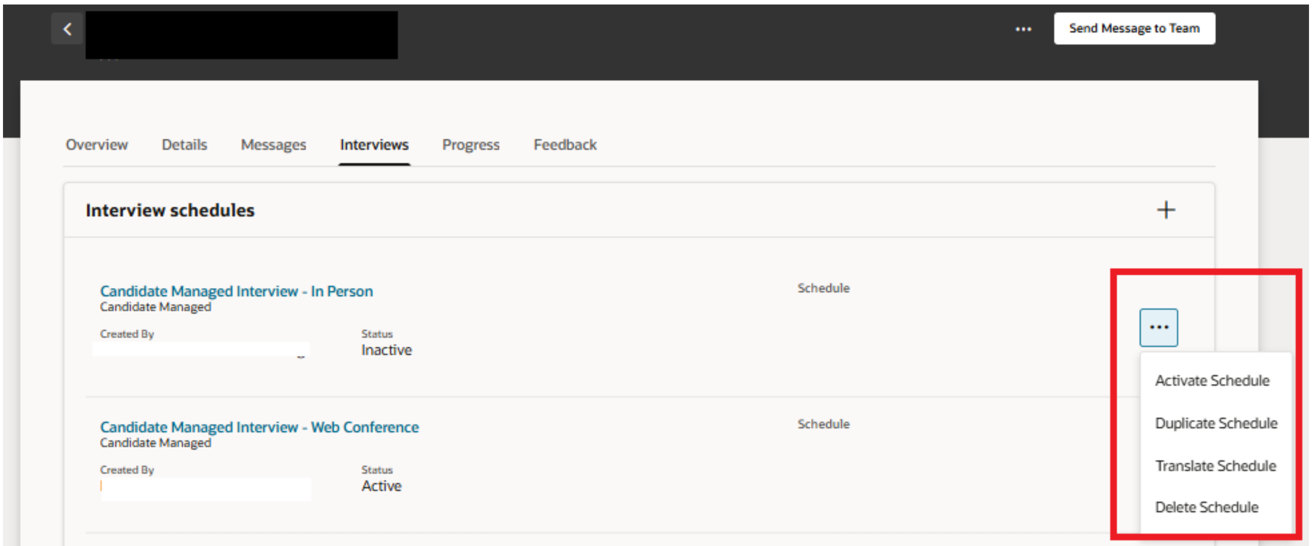



12. **Click Submit** once you have added all the slots you need, this will return you to the Job requisition Interview tab. You can view the schedule from here by clicking on the title.




13. The schedule will default to being **active, allowing candidates to book a slot when invited.**

- To **inactivate an interview schedule** click the **ellipsis** button and click **Inactivate schedule**.
- To **delete a schedule**, first inactivate the schedule and then click the **ellipsis** button, you will now see an option to **delete schedule.**
- To **reactivate a schedule**, click the **ellipsis** button and click the option to **activate schedule**.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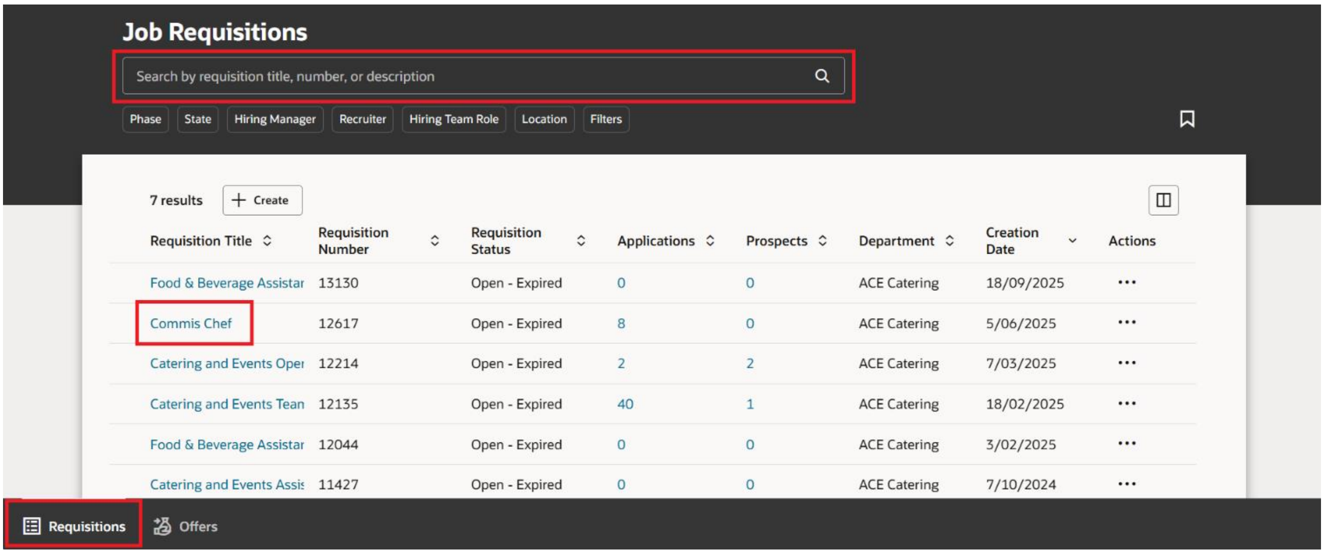
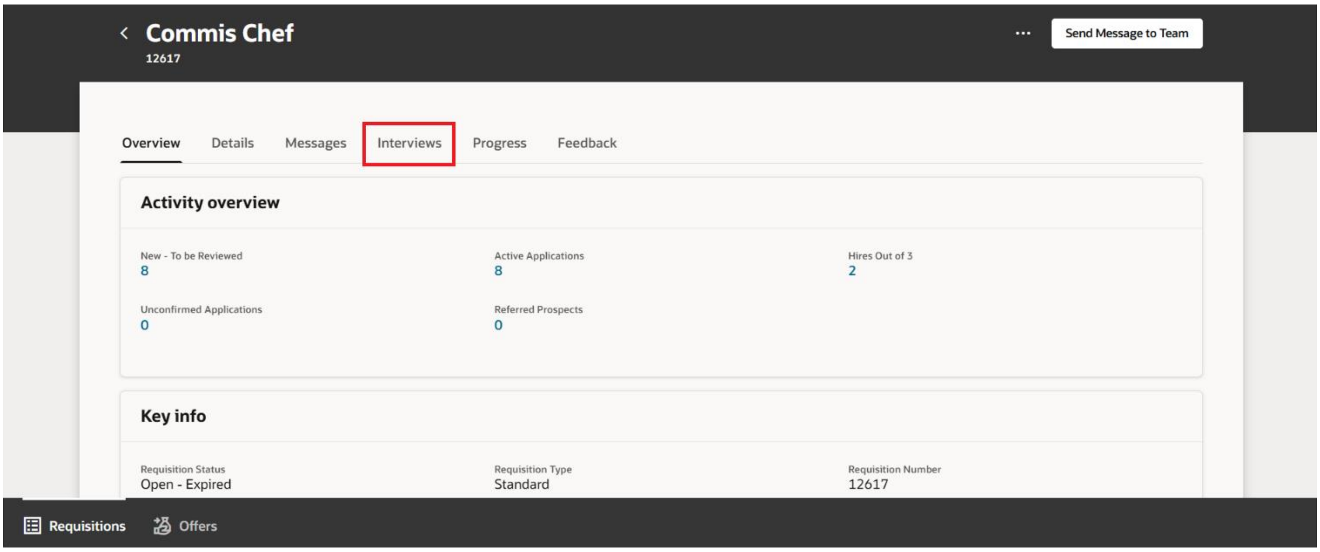
Send Message to Team
Overview
Details
Messages
Interviews
Progress
Feedback
Interview schedules
Candidate Managed Interview - In Person
Candidate Managed
Schedule
Created By
Status
Inactive
Activate Schedule
Duplicate Schedule
Translate Schedule
Delete Schedule
Candidate Managed Interview - Web Conference
Candidate Managed
Schedule
Created By
Status
Active

## How to make changes to an Interview Schedule or add, amend, delete timeslots

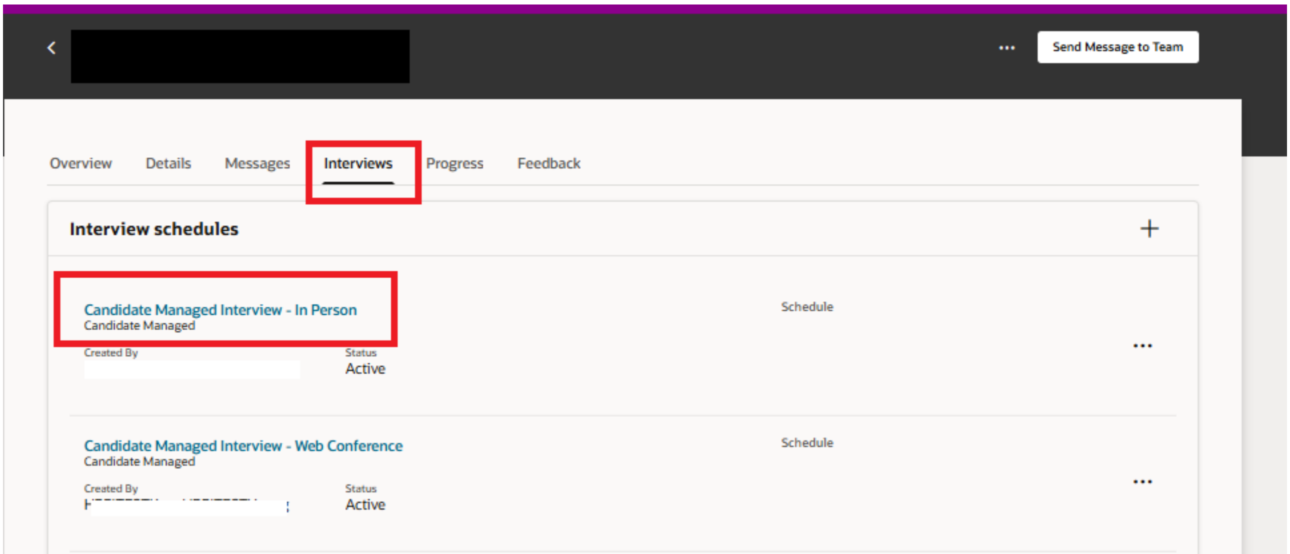
1. Within the **Hiring App**, find the requisition you want add slots to.



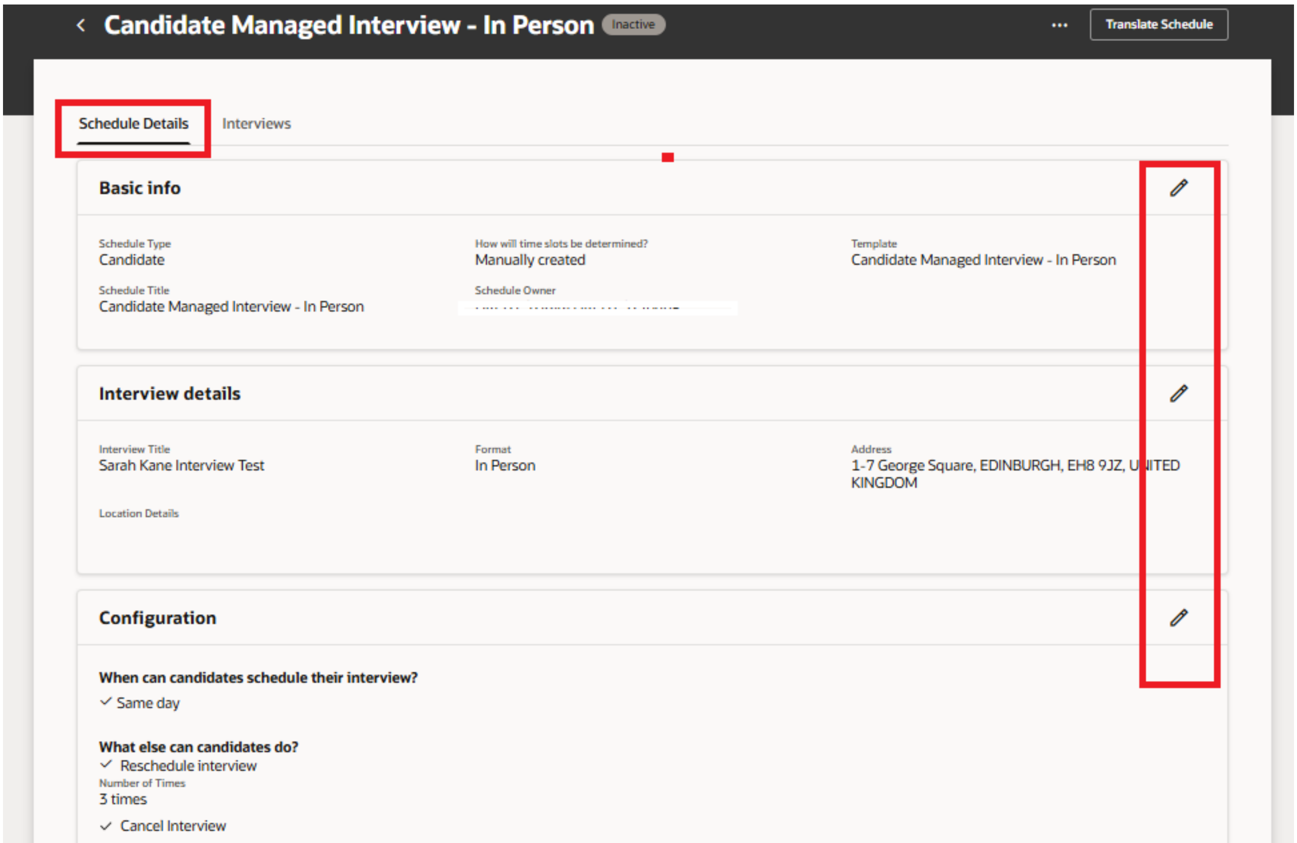

2. Click the **Interviews** tab.



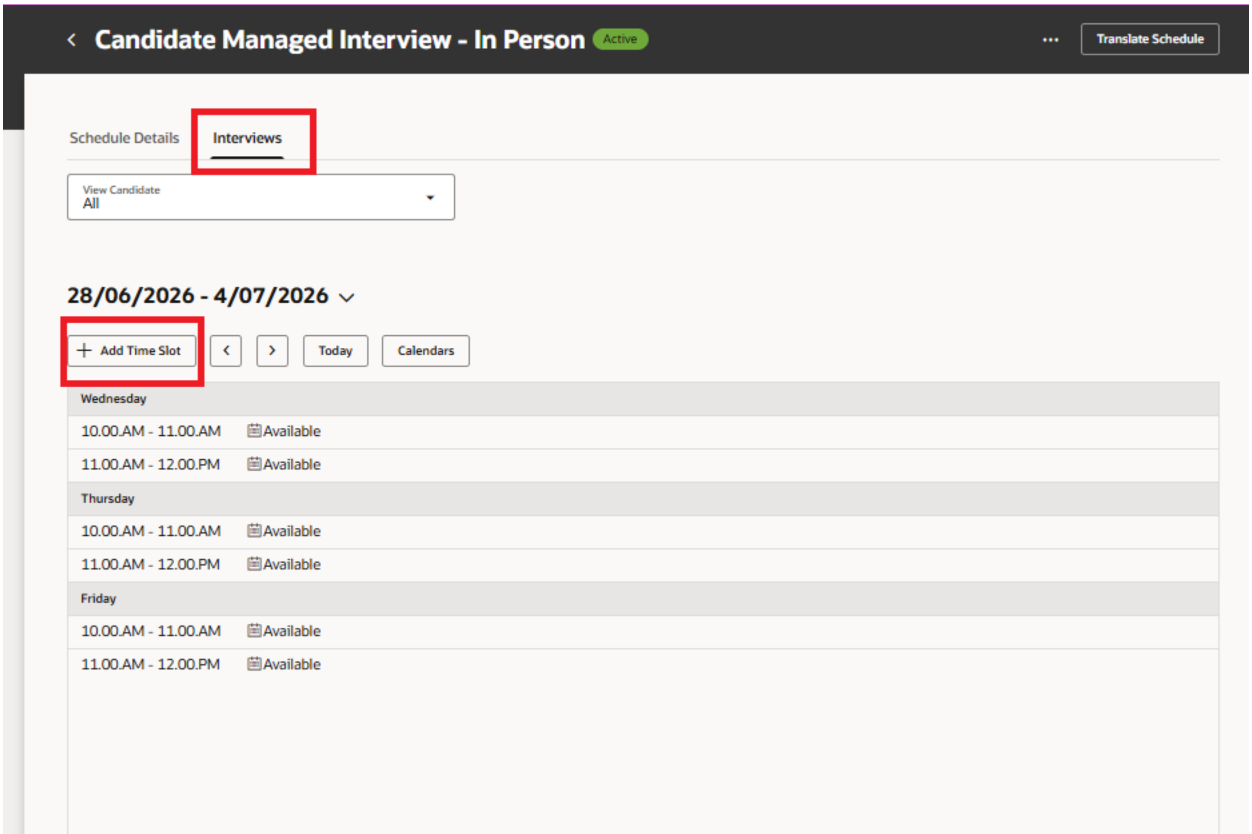

3. Select the interview schedule you have previously created.



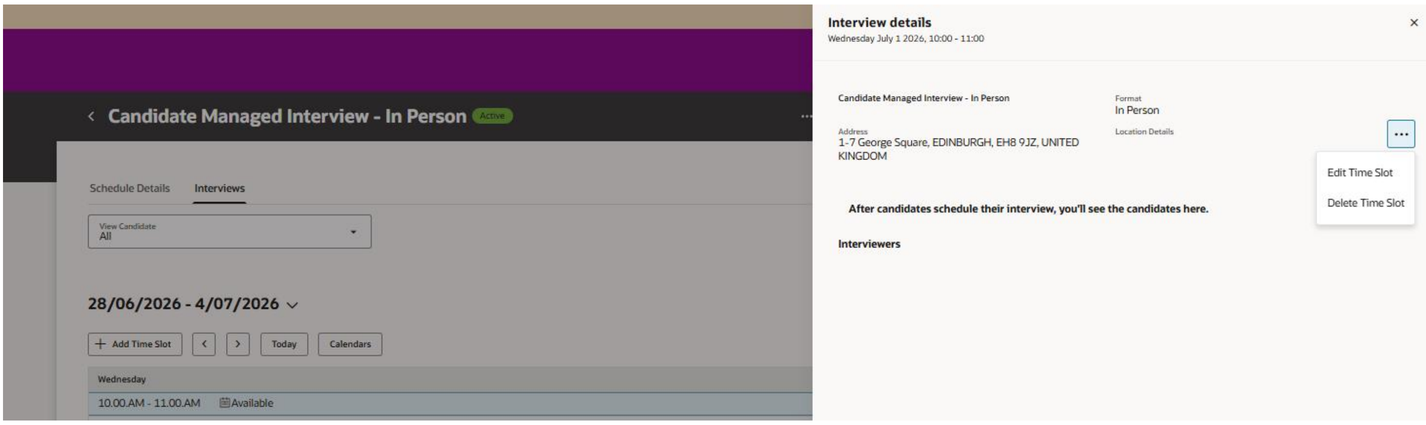

4. Click on the pencil icon to edit any of the schedule details.




5. To add timeslots, navigate to the Interviews Tab and click on +Add Timeslots and complete as required.



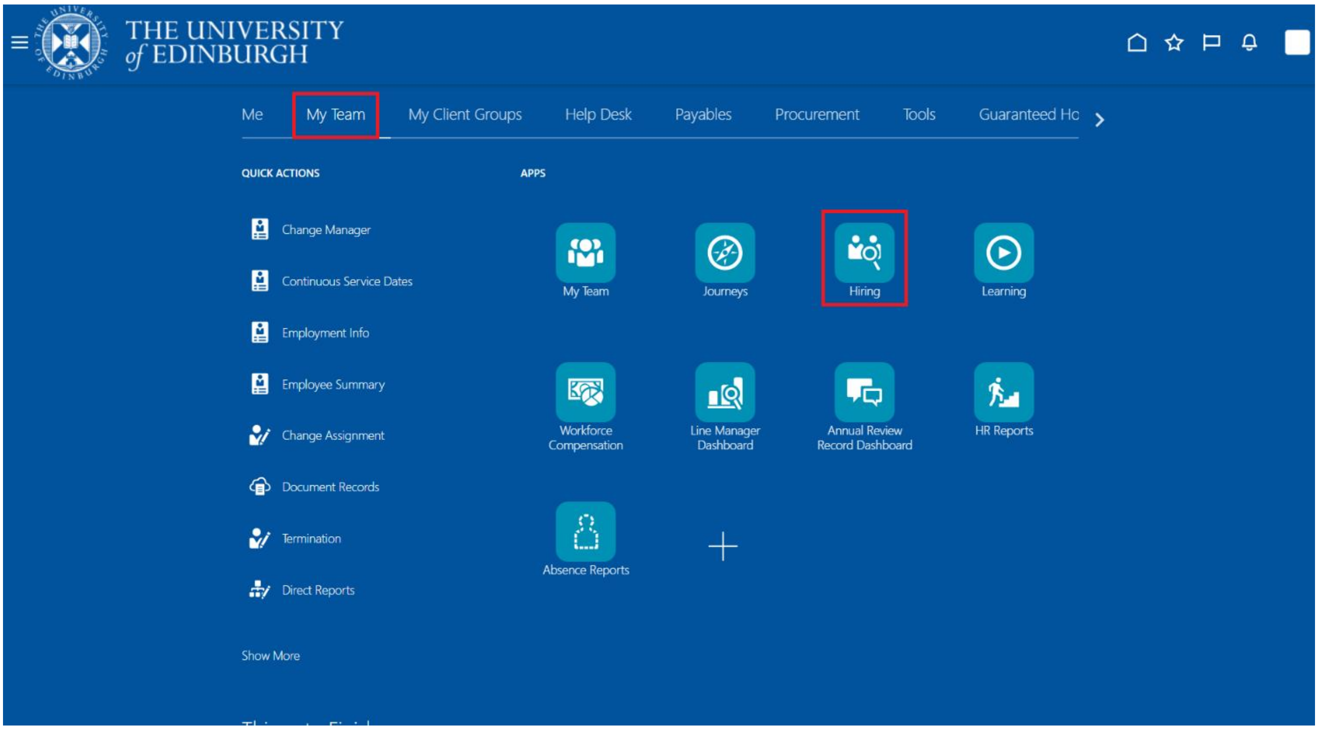

6. If you need to **edit or delete** any of the slots click on the slot and then the ellipsis on the right hand side of the screen to edit or delete. If there are already candidates booked in to the slots, the "Cancel Interview" option will appear, you should cancel before deleting.  Both the candidate and the interviewer(s) will receive a notification to confirm the cancellation.



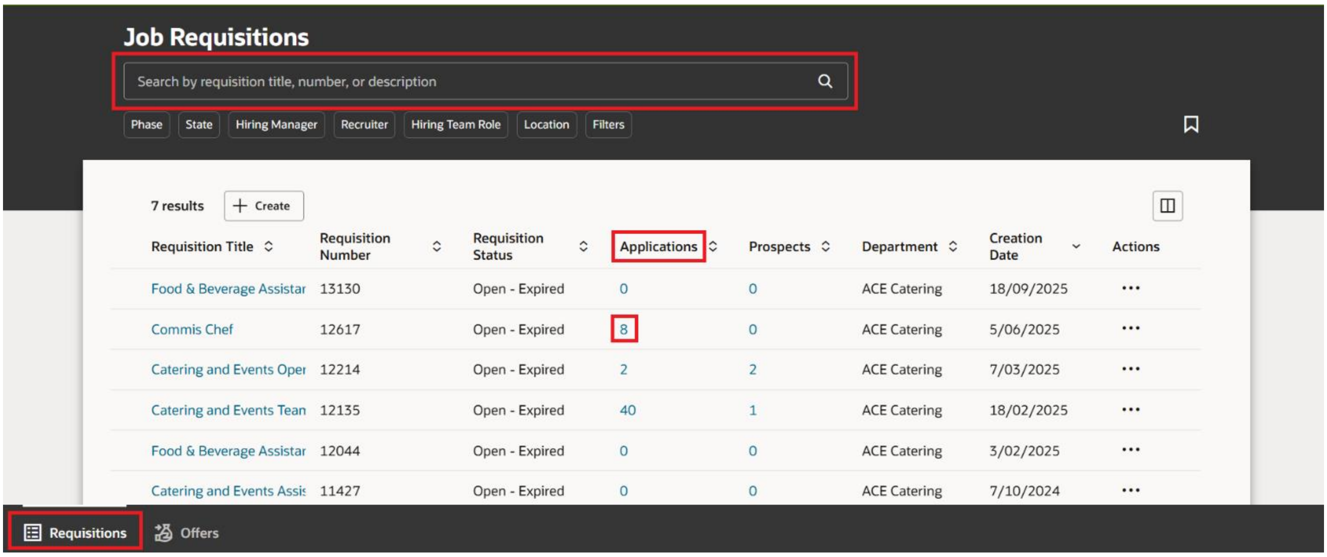
## How to Invite a Candidate(s) to an Interview

Once you have created your schedule and have all appropriate timeslots you can then proceed to inviting the selected candidates to interview.

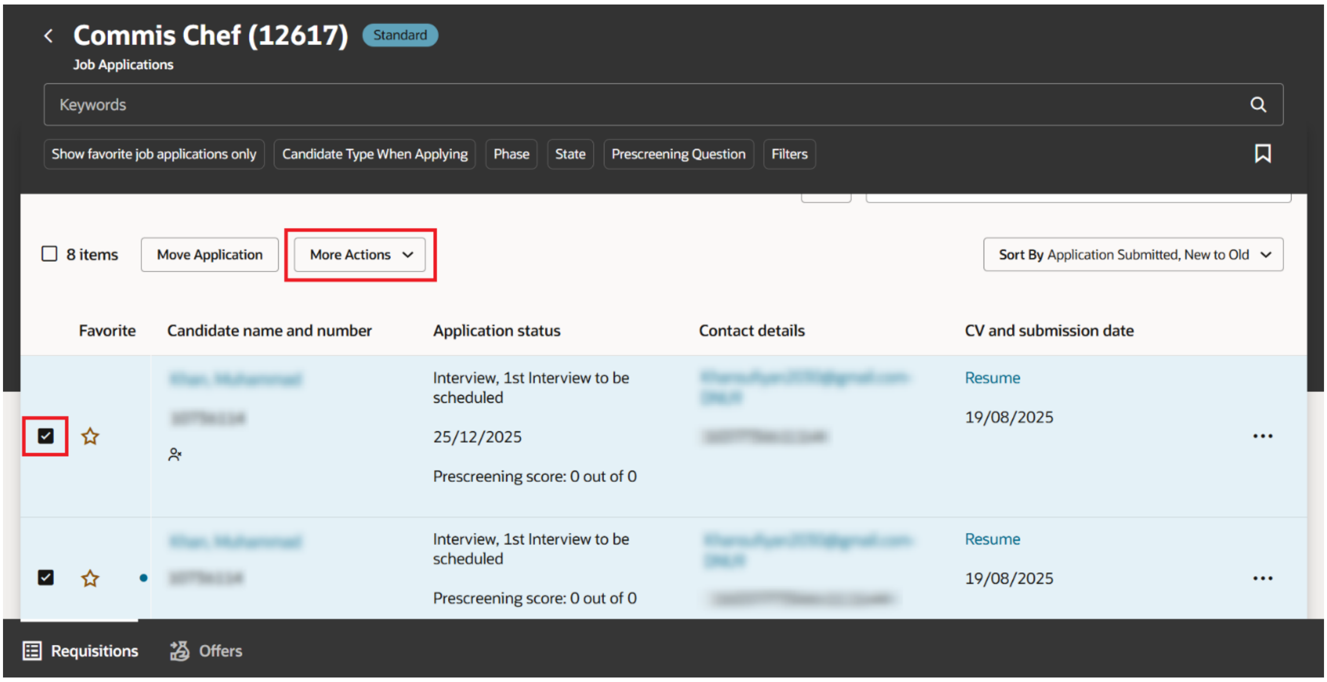
1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.



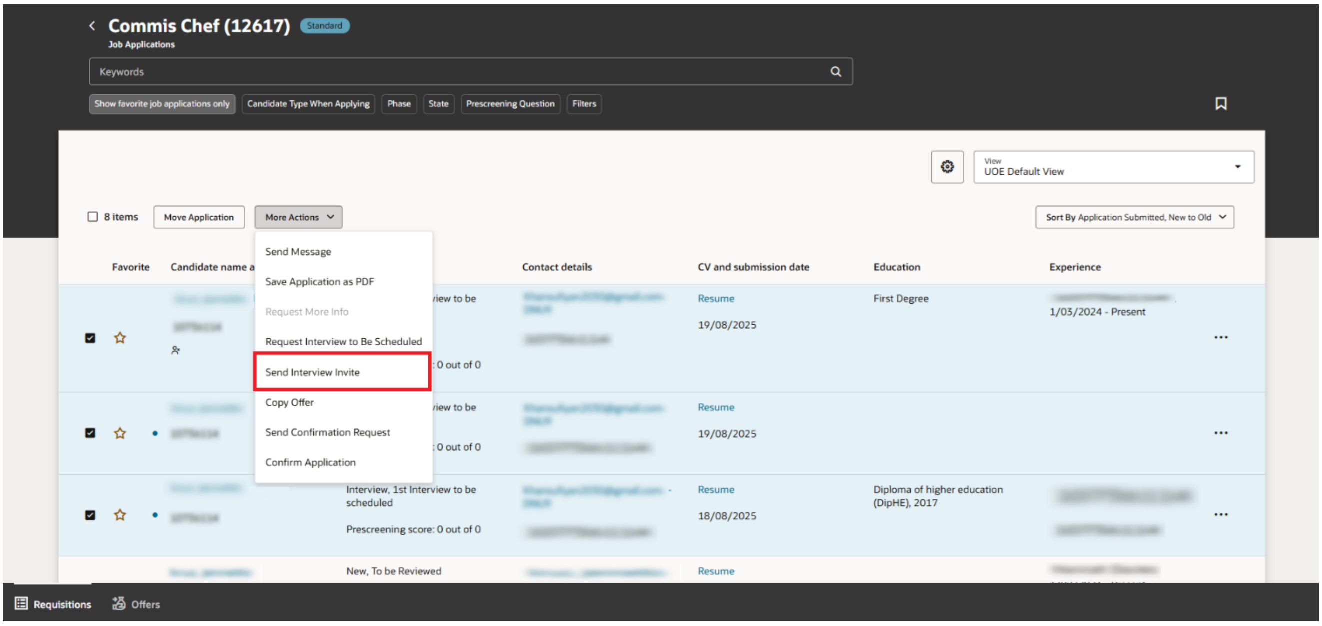

2. There are two tabs at the bottom of the screen: Requisitions and Offers. Ensure the **Requisitions** tab is selected and search for the job requisition using the requisition title, number or description. Click on the **number of applications** for the correct job requisition.



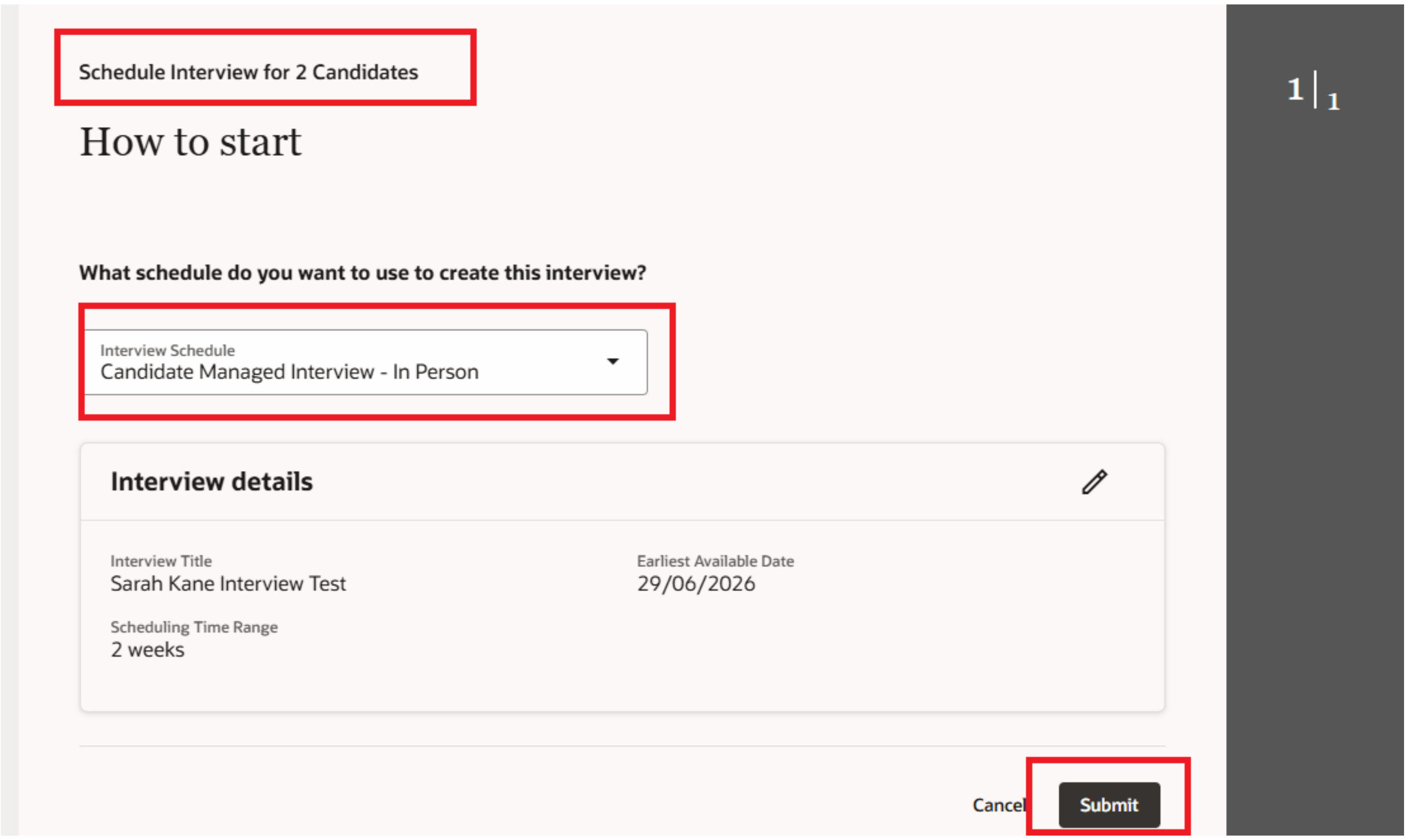

3. Select the candidates you want to invite to interview and click on the **More Actions** button.




4. Then select **Send Interview Invite**.




5. Select the candidate managed interview you have created, then click **Submit.**

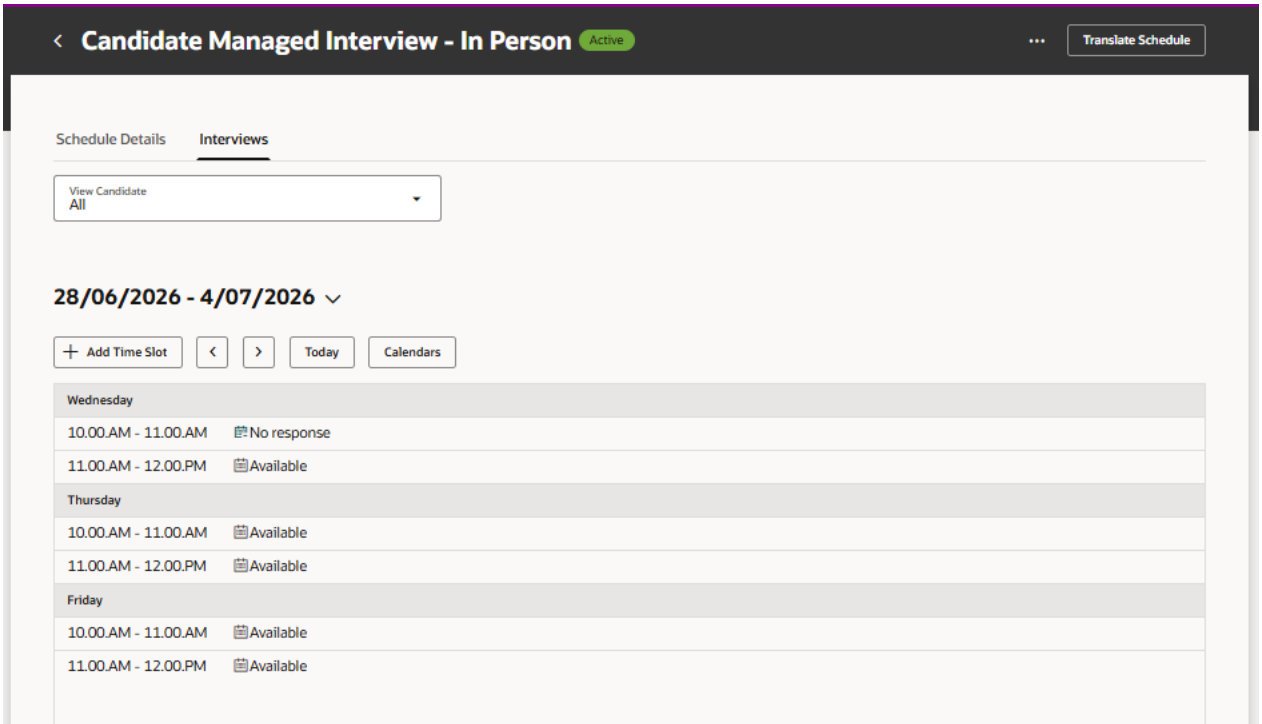



6. Remember to update the candidate's status to **1st Interview Scheduled** (see next section for guidance).

   An example of the interview information sent to the candidate and the interview team are in the appendices for reference.

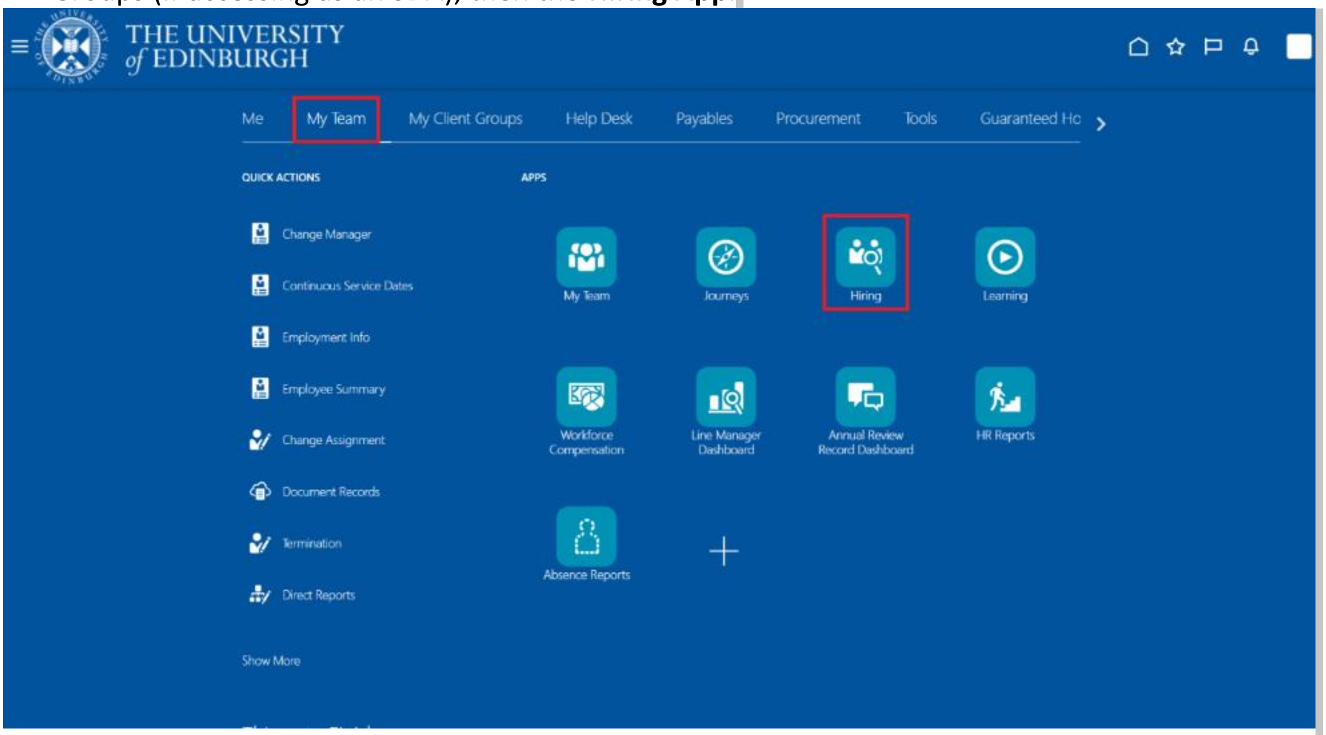
**Please note:** When candidates are asked to schedule an interview there is an option for them to request additional date/time slots. When candidates make a request the Hiring Manager and named recruiter will receive a notification that contains details of the request. You can add additional slots as per the steps above. Once these are added the candidate can access any newly added slots from their original notification.

7. Once the candidate has booked a slot you will receive a notification. You can also view a summary of slots available or scheduled by navigating to the requisition, interviews tab and view the details:

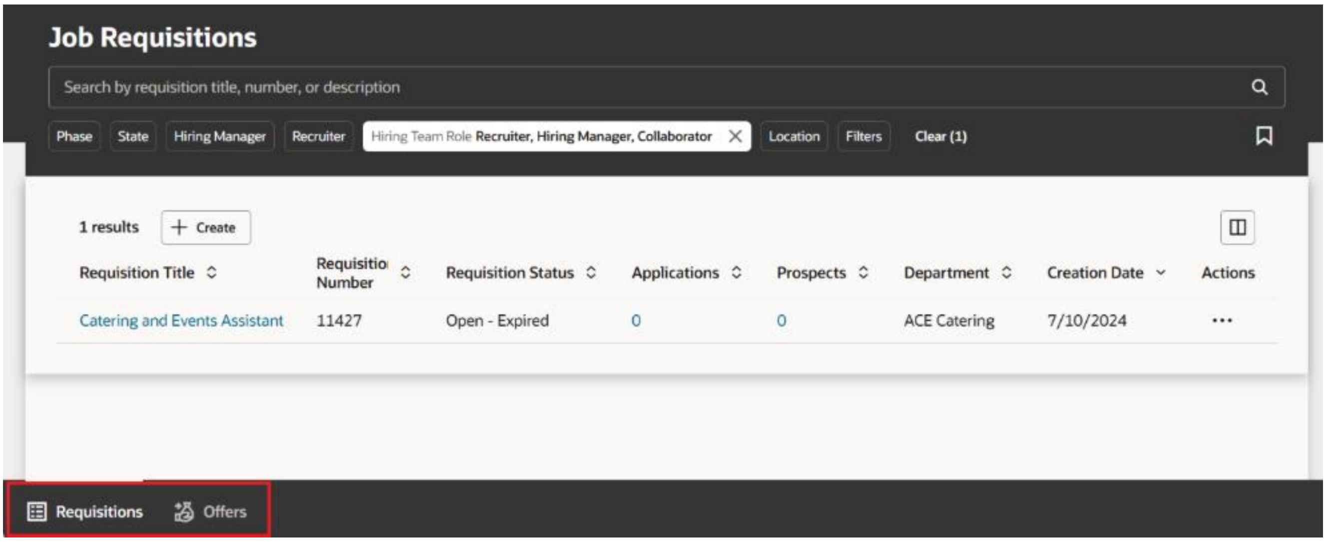



## Cancelling or Rescheduling an Interview

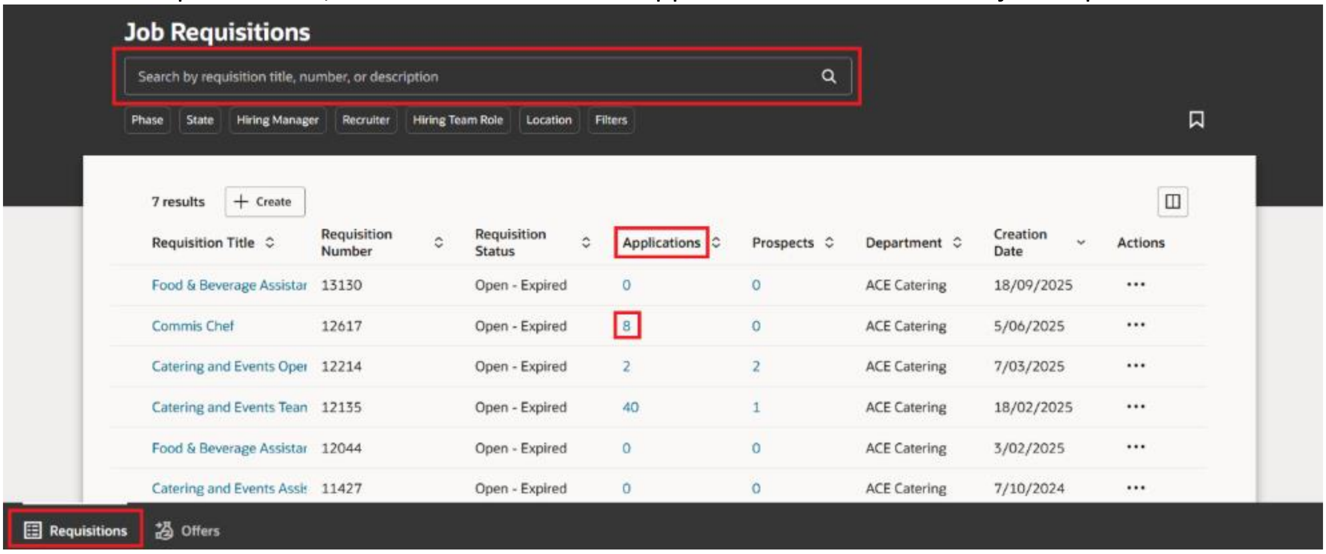
1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.



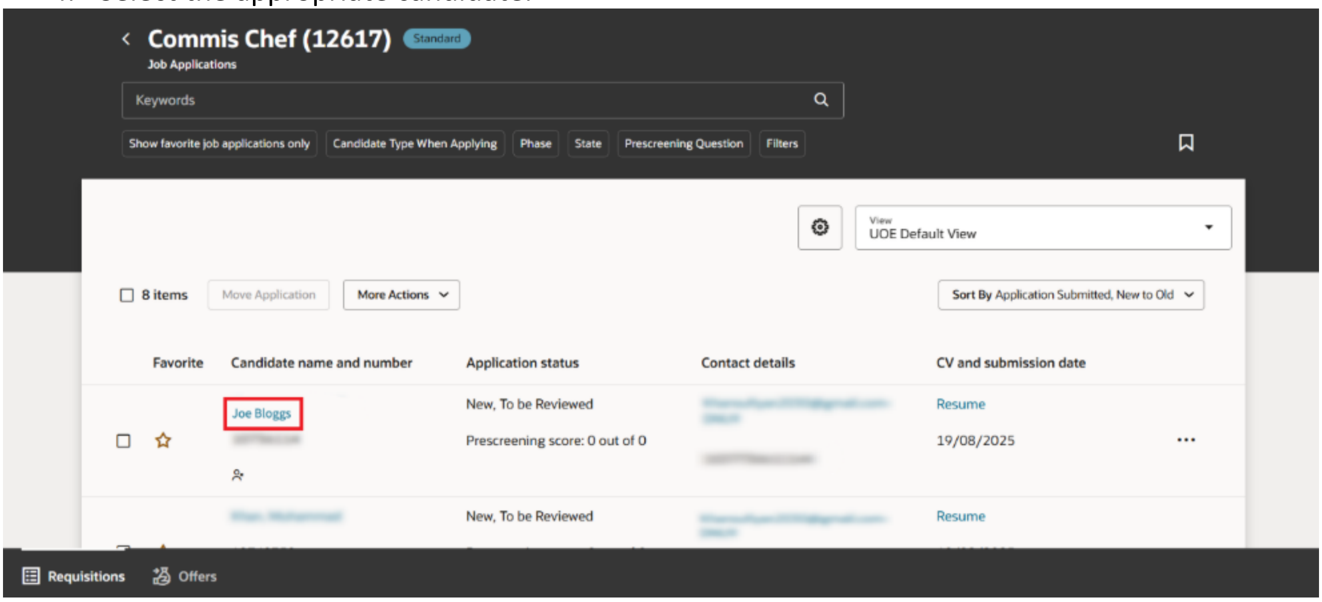

2. There are two tabs at the bottom of the page in the Hiring app: **Requisitions** and **Offers**



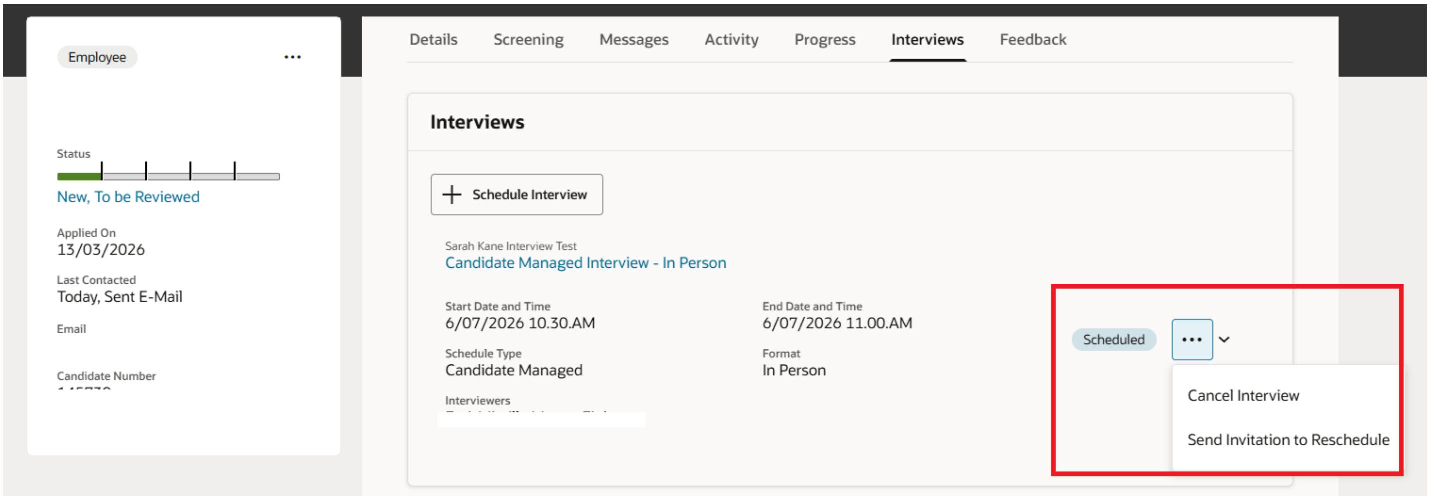

3. In the **Requisitions** tab, search for the job requisition using the requisition title, number or description. Then, click on the number of applications for the correct job requisition.




4. Select the appropriate candidate.

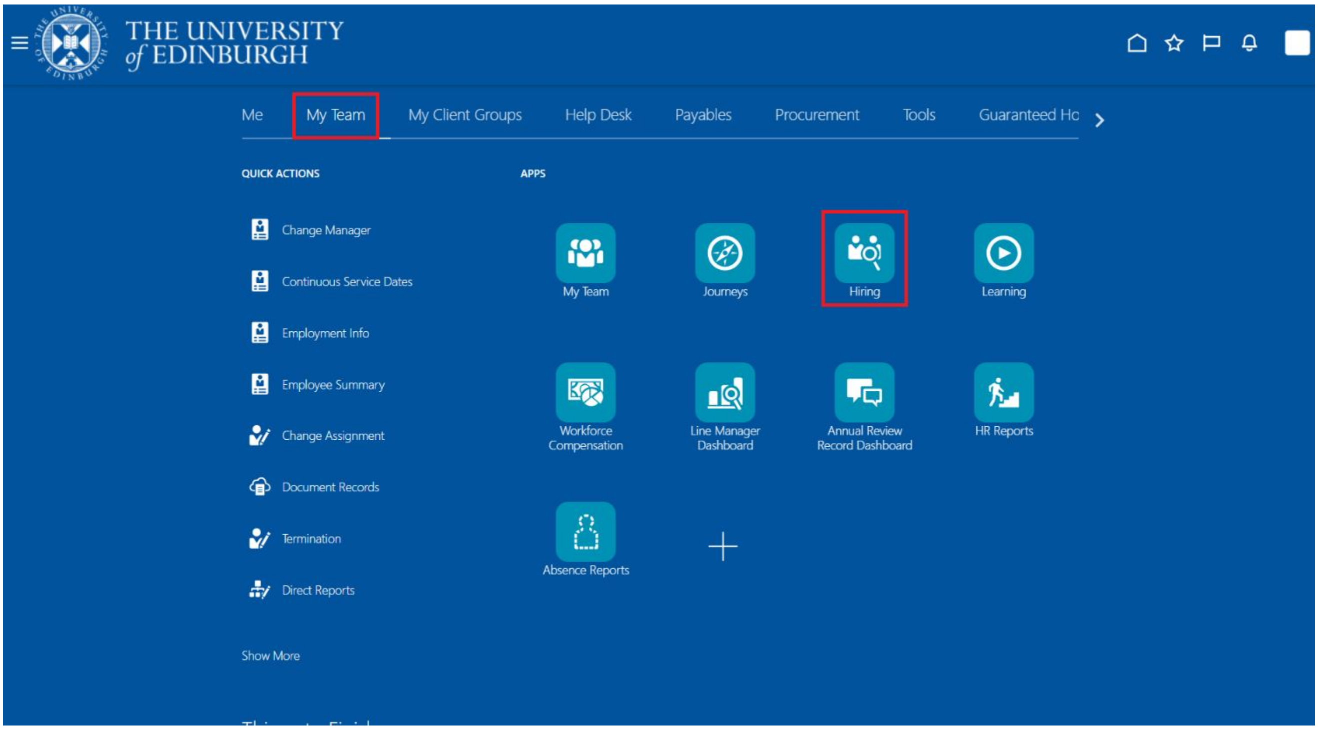


5. Select the **Interviews** tab then click on the ellipsis (3 dots) and select **Cancel Interview.** The Candidate and hiring team will receive a notification. If you want to **Reschedule** the interview click on **'Send Invitation to Reschedule'**. In this scenario you should have already checked that you have available slots for them to book.

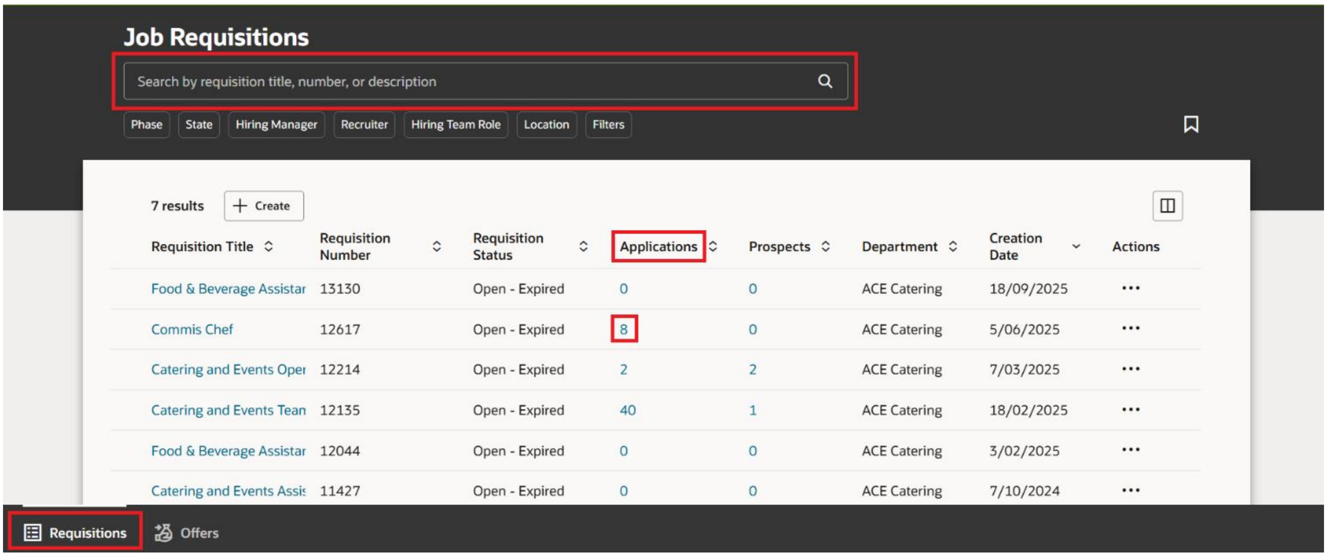



## How to Update the Candidate Status

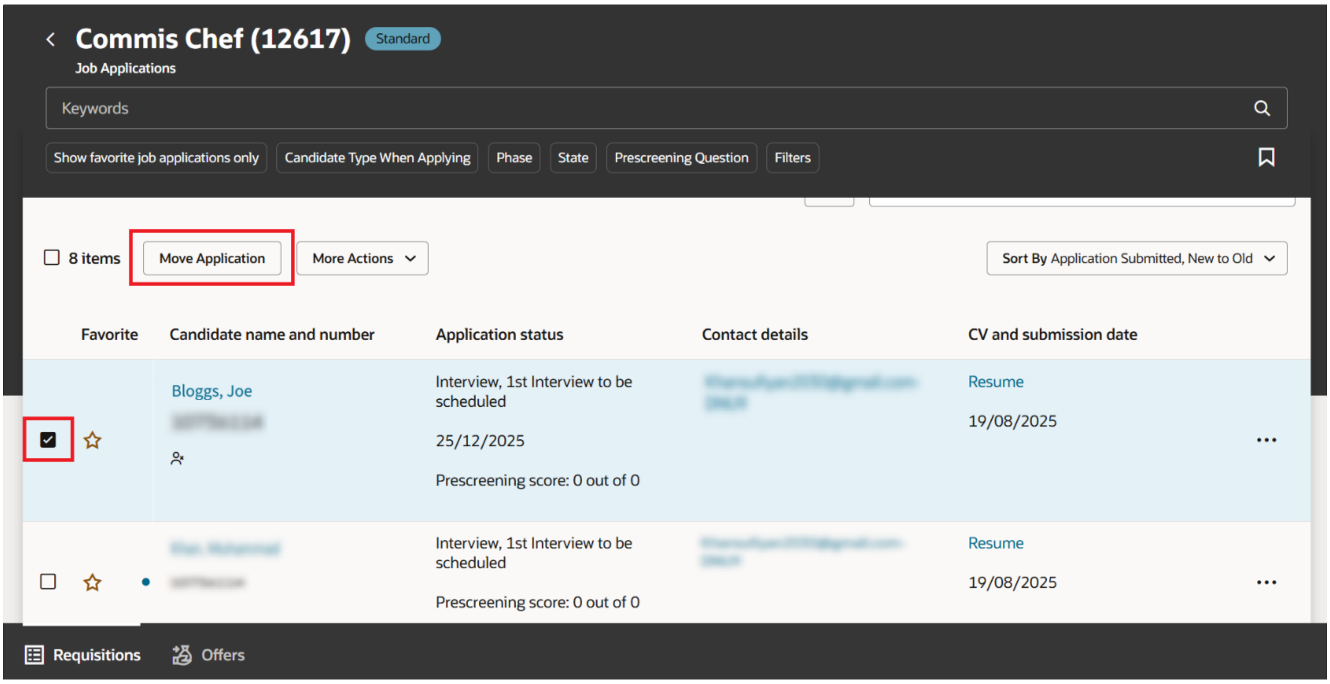
1. From the People and Money homepage select My Team (if accessing as a Line Manager) or My Client Groups (if accessing as an SDA), then the **Hiring App**.



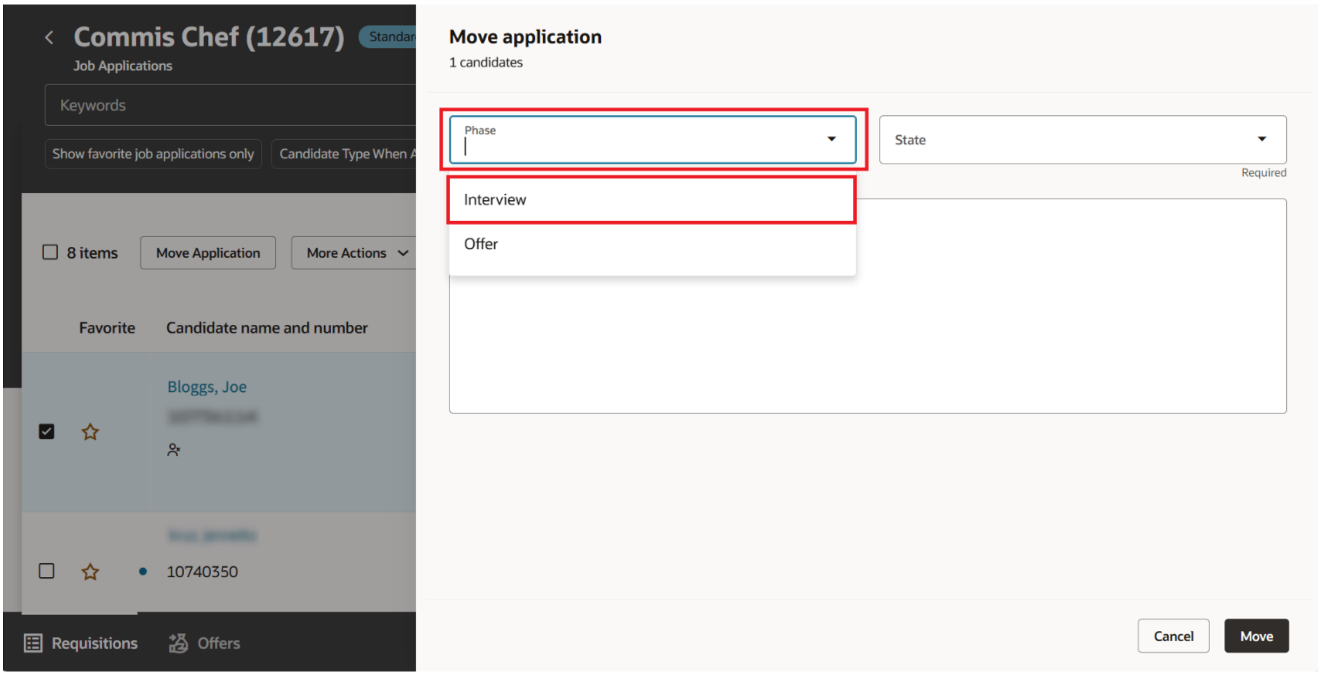

2. There are two tabs at the bottom of the screen: Requisitions and Offers. Ensure the **Requisitions** tab is selected and search for the job requisition using the requisition title, number or description. Click on the **number of Applications**.


Job Requisitions
Search by requisition title, number, or description
Phase
State
Hiring Manager
Recruiter
Hiring Team Role
Location
Filters
7 results
Create
Requisition Title
Requisition Number
Requisition Status
Applications
Prospects
Department
Creation Date
Actions
Food & Beverage Assistar 13130 Open - Expired 0 0 ACE Catering 18/09/2025
Commis Chef 12617 Open - Expired 8 0 ACE Catering 5/06/2025
Catering and Events Oper 12214 Open - Expired 2 2 ACE Catering 7/03/2025
Catering and Events Tean 12135 Open - Expired 40 1 ACE Catering 18/02/2025
Food & Beverage Assistar 12044 Open - Expired 0 0 ACE Catering 3/02/2025
Catering and Events Assis 11427 Open - Expired 0 0 ACE Catering 7/10/2024
Requisitions
Offers

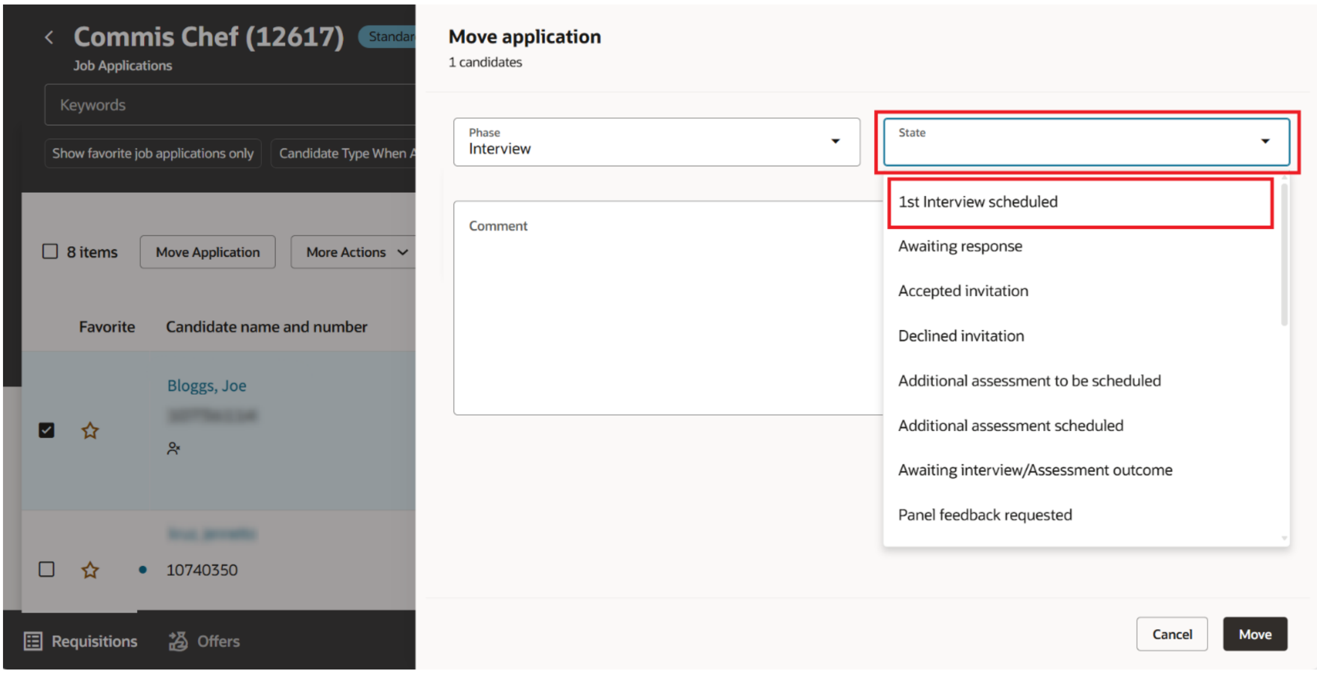
3. From the **job applications** screen select the **checkbox** next to the candidates' name, click on the **Move Application** button.



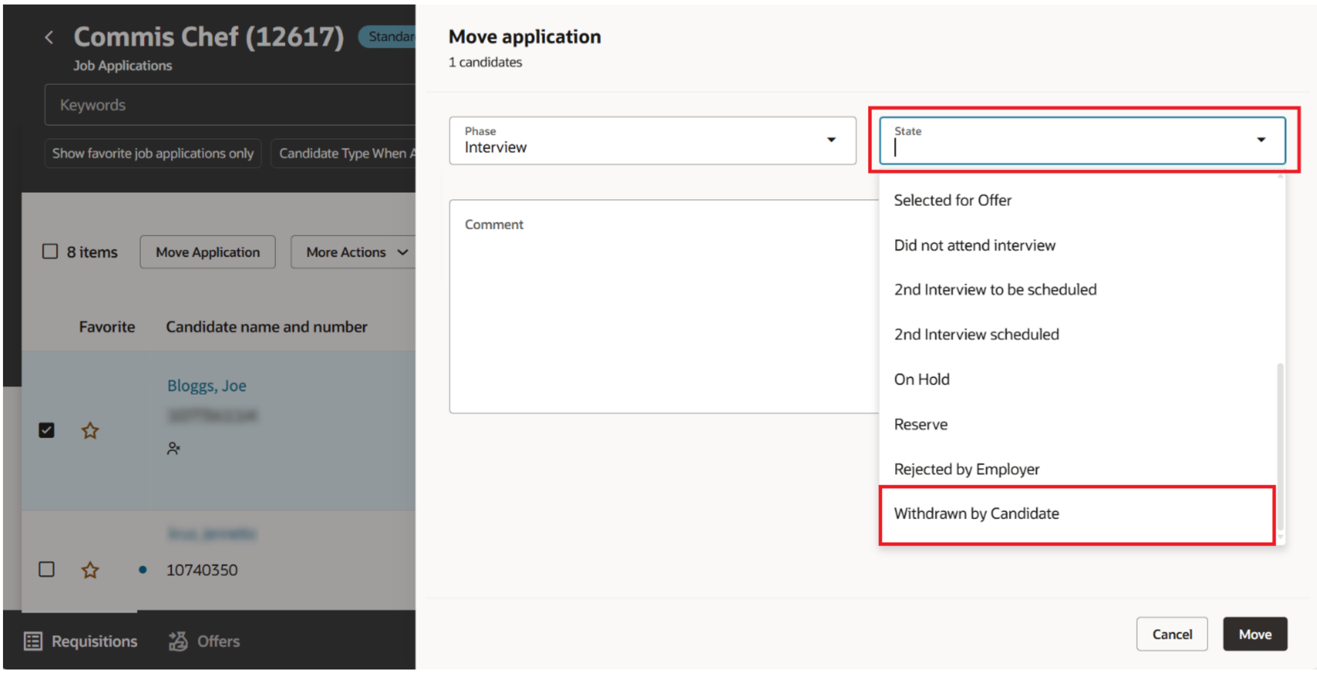

4. Use the **Phase** dropdown to select **Interview**.




5. Then use the **State** dropdown to select **1st Interview Scheduled** then click the **Move** button.

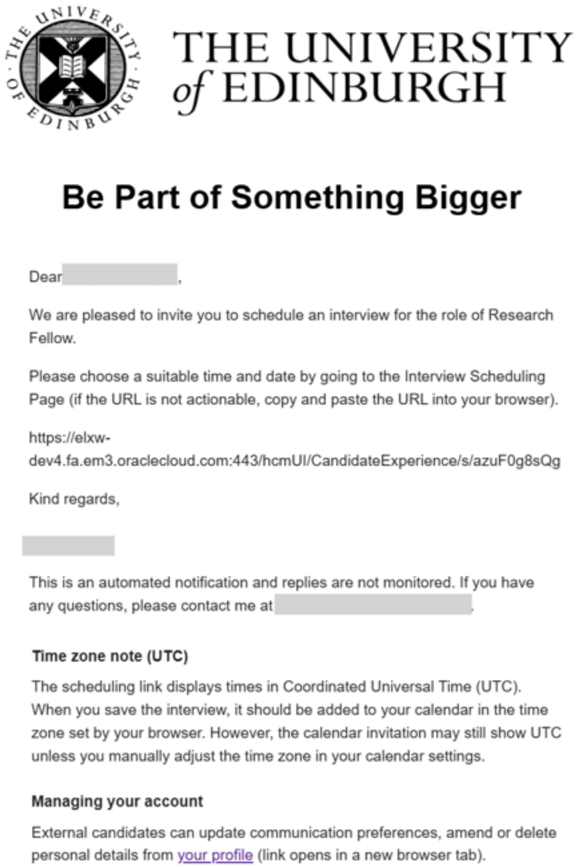



6. If the candidate cancels an interview and does not plan to reschedule, ensure you update the state to **Withdrawn by Candidate**.



# Appendix

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



THE UNIVERSITY of EDINBURGH

**Be Part of Something Bigger**

Dear ,

We are pleased to invite you to schedule an interview for the role of Research Fellow.

Please choose a suitable time and date by going to the Interview Scheduling Page (if the URL is not actionable, copy and paste the URL into your browser).

https://elxw-dev4.fa.em3.oraclecloud.com:443/hcmUI/CandidateExperience/s/azuF0g8sQg

Kind regards,

This is an automated notification and replies are not monitored. If you have any questions, please contact me at .

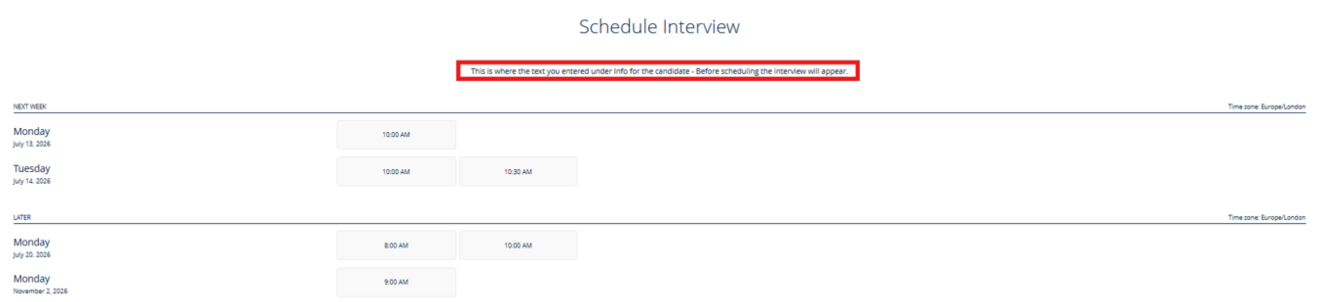
**Time zone note (UTC)**

The scheduling link displays times in Coordinated Universal Time (UTC). When you save the interview, it should be added to your calendar in the time zone set by your browser. However, the calendar invitation may still show UTC unless you manually adjust the time zone in your calendar settings.

**Managing your account**

External candidates can update communication preferences, amend or delete personal details from your profile (link opens in a new browser tab).

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




It is possible for candidates to request additional interview slots.

## Appendix B – Example of interview confirmation email sent to candidates

THE UNIVERSITY of EDINBURGH

**Be Part of Something Bigger**

Dear ,

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

- Start date: 13/07/2026 11.00.AM British Summer Time
- Role: Research Fellow
- Interview type: In Person
- Interviewer(s):

**Location:** 1-7 George Square, EDINBURGH, EH8 9JZ, UNITED KINGDOM

https://www.accessable.co.uk/the-university-of-edinburgh/central-area/access-guides/george-square-50

**Additional information:**

This is where the text you entered under Info for the candidate - For the scheduled interview will appear.

This is where the text you entered under Info for the candidate - Additional notes will appear.

Use this link to download the calendar attachment and add the interview to your calendar:
https://elxw-dev4.fa.em3.oraclecloud.com:443/hcmUI/CandExpSecured/interviewCalendar?token=Aenc2_3ahgjk1ur2fVljjO4VeE4J_2fdAaoPRniANWIPvkT59u_2b7jgFVGvkOWtOkCxnjWeACN5hfSztvQ2c5zCIPWb8mtvzeorLRVZj19EZ_2fKHhiCm9DfYJyQ0MuzgsONuUbSGdQ4EE5nQB5uchXmXquyT4lE7xSFxSPsGQuowu7pLHN14GDhRwCDiTw_3d_3d

**Time zone note:** Calendar links use Coordinated Universal Time (UTC). When you save the interview, it will be added to your calendar in the time zone set by your browser. However, the calendar invite may still display UTC unless you change the time zone settings in your calendar.

Prior to any employment commencing with the University, you will be asked to provide documents to demonstrate your Right to Work in the UK. This includes if you are already working with us as a contractor or agency worker. Further information about the documents that provide evidence can be found on the Demonstrating your Right to Work webpage (opens in a new browser tab).

We are committed to ensuring that our selection process is accessible to all candidates. If you require any reasonable adjustments at any stage (for example, an accessible venue or an alternative format), please let us know.

External candidates can view interview details by logging into your profile and clicking clicking on "My Applications". If you circumstances have changed, you can also cancel your interview from there, or email

Internal candidates can view or update their interview by going to submitted applications, expanding the active applications section, then clicking the relevant interview.

This email is an automated notification and replies are not monitored.

## Appendix C – Example of the interview scheduled notification

This email is sent to the interviewers

THE UNIVERSITY of EDINBURGH

Here are the details of the interview scheduled with

**Date and time:** 14/07/2026 11.00.AM British Summer Time
**Requisition:** Business Analyst - 14016
**Interview type:** Web Conference

**Web conference link:** www.test.com
**Dial-in number:** +44 (1234)56778
**Access code:**

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

You can access the candidate's CV here: View CV

Access the job description using: Job Requisition quick link
Once on the requisition page, go to the **Details** tab, expand **Posting Description**, and select the link to view the full job description.

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

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

## Version History

| Version | Date | Description | Approved By |
|---|---|---|---|
| 2.0 | 15 December 2025 | • Updated guide to new format.<br>• Updated screenshots and steps to reflect Redwood changes in P&M. | SK |
| 3.0 | 13 July 2026 | • Updated to reflect changes and move of Interview Management to Redwood Screens | 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.