People and Money system

We know this format may not be accessible for all. To request this guide in a different format please email hrhelpline@ed.ac.uk.

How to Create and Maintain a Job Requisition

Hiring Manager / Line Manager / School/Dept. Admin / Business Support Team

Estimated time to complete: 20 minutes

Before you start

Familiarise yourself with the Guide to Recruitment and Onboarding which provides detailed guidance for each step in the recruitment process and the Employment Approvals guidance document which outlines the University’s budgetary approval workflow for raising job requisitions for hiring staff.

To prepare for creating a Job Requisition in People and Money you should:

• Have a Job Description, approved and graded and save this to the Job Description Library Sharepoint
• Check the Position for the vacancy you wish to fill to ensure there is a position available in the structure within People and Money within the correct grade band and with available FTE.
• Create a Job Requisition Business Case form which will support the approval process
• Check the Redeployment Register prior to advertising. If a suitable candidate is identified on the Redeployment Register, please follow the ‘Add Pending Worker’ process
• If applicable, familiarise yourself with the Relocation Policy before adding relocation details to the requisition.

Other Points to Note

• If a recruiter (administrator) is due to be absent for any period of time, the name must be updated with a suitable alternative recruiter within the Hiring Team section of the requisition details.
• It is recommended that you use pre-screening questions to effectively filter your applications. These must be attached at job requisition creation stage. If the pre-screening question you need is not in the question library, please raise a service request to HR Systems to have the question added to the question library before you submit your requisition for approval.
• **Please note** – if you need to withdraw a job requisition submitted for approval, this must be done by raising a Service Request with the enquiry type 'System Related'.

• If you need to readvertise a job requisition, please raise a service request to HR Operations.

• Please **do not** close a requisition due to UKVI requirements.

It is now possible to track how job requisitions are moving through the approval process by viewing banners displayed on the Overview and Details tabs of job requisitions. Job requisition initiators and approvers can also click links on these banners to get more details such as viewing the whole requisition or seeing who is the next approver in line, and to take actions on the requisition such as approving or rejecting the requisition or requesting more information.

You will receive a notification once your requisition has reached HR Operations and they are formatting the advert which is the next stage of the process before posting to careers sites.

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**In Brief…**

**Creating a Job Requisition**

1. From the **Home** page:
   - click on **My Team** if you are a Line Manager or Hiring Manager
   - click on **My Client Groups** if you are Business Support or School/Department Administration

2. Click on the **Hiring** app

3. Click **Add**

4. In the **How** section of the requisition, click **Use** and select the relevant template. (To read an explanation of the **Job Requisition Use Types**, go to **Appendix 1**.)

5. Click **Continue** when the **How** section is completed.

6. Complete the remaining sections with all the required information.
7. Click Submit to send the requisition for approval and posting on internal career section and/or external job boards.

For detailed guidance, see the next section.

Submitting a Job Requisition for Approval

1. Review the requisition and ensure it is completed correctly with the required information.

2. Click the Submit button in the black banner. The requisition is listed with the status Approval – Pending in the Job Requisitions page.

3. Once it is authorised by the Approvers, the status in the Job Requisitions page is updated to Job Formatting – In Progress and it is ready to be posted by HR Operations.

4. After it is posted, the status in the Job Requisitions page is updated to Open – Posted and candidates can apply for the role.

For detailed guidance, see the next section.

Saving a Draft Job Requisition

1. In the requisition complete the section that you are editing, ensuring that there is no data missing from mandatory fields.

2. Click Save and Close in the black banner.

3. The Job Requisitions page opens, and the requisition is listed with the status Draft – In Progress.

For detailed guidance, see the next section.

Editing a Draft Job Requisition

1. Open to the Job Requisitions page and click on the applicable requisition in the status Draft – In Progress.

2. Click on the Continue button until you navigate to section that you want to edit or to continue working from.
3. Refer to the appropriate steps in Creating a Job Requisition to continue creating the requisition.

Deleting a Job Requisition (not submitted for approval)

1. To delete a saved job requisition which has not been submitted for approval navigate to Hiring and locate the job requisition.
2. Click the ellipsis button and select Delete Job Requisition
3. Click Yes to confirm

Cancelling a Posted Job Requisition

1. To cancel a job requisition navigate to Hiring, and locate the job requisition.
2. Click Actions then select Cancel Job Requisition.
3. Click Yes to confirm
4. If there have been applications to the requisition, continue to step 5 below
5. Select the applications link
6. Remove the filter showing only active applications
7. Click the checkbox to select all applicants
8. Select Actions then Send Message
9. Click Continue in Candidates section
10. There is no template for rejection due to cancellation at advertising stage, therefore select Blank Message and Adhoc Notification Template then click Continue
11. Type your message to candidates, inserting any relevant tokens as appropriate, then select Continue
12. Preview your message. If you are happy with the content select Send. To make any amendments, select Edit in the message section and repeat step 11.

For detailed guidance, see the next section.

Creating a Job Requisition

1. From the Home page, click on the My Team/My Client Groups link.
2. Click the **Hiring** app.

3. The **Job Requisition** page opens and the list of requisitions you have created, if any, is displayed. Click **Add** to create a new one.
4. The **Create Job Requisitions** page opens in section **1 How**.

   In total there are 11 sections to complete before the requisition can be submitted for approval.

   A draft copy of the job requisition can be saved at any stage and completed later. See **Saving a Draft Requisition** below for information.

5. Complete the following fields in the **How** section:

   a. Click **Use** and select the relevant option. The fields that you see depend upon the option you select as they each have minor differences. In the example, “Position” has been chosen.

      If you are wanting to advertise multiple jobs within one advert (that cover multiple grade boundaries and require a unique position, eg Lecturer, Senior Lecturer and Reader), please select **Blank Requisition**. The relevant position for that job can then be added onto the job offer.

      To read an explanation of the **Job Requisition Use Types**, go to **Appendix 1**.

   b. Select the appropriate **Business Unit**.

   c. Select the job **Position**

6. Click **Continue** and section **2 Basic Info** opens.

7. Complete the following fields in the **Basic Info** section:

   a. The **Requisition Type** is set to pre-populated from the 1 How section

   b. Enter the **Requisition Title** (this is what will be seen when the job is advertised)

   c. The **Number of Openings** defaults to 1

      o click into the field to change the number if required, or

      o if it applies, click on the down arrow in the “Limited” field and select “Unlimited”

   d. The **Position** is set by default from the option selected in the **How** section
e. Click in the Business Justification field and select an option. The option chosen here will influence the approval route for the requisition. Please see Appendix 3.

f. By default, Languages is set to “American English”

8. Click Continue and section 3 Hiring Team opens.

9. Complete the following fields in the Hiring Team section:

a. Select the Hiring Manager
b. Select the Recruiter. This is normally the administrator in your area. This needs to be maintained in the case where an administrator is absent for any period of time.

   c. Select the Collaborators by collaborator type:

   (1) Collaborator – someone who helps review applications (but cannot move candidates between phases and states)

   (2) Offer Specialist – someone who will be part of the job offer team for the successful candidate(s) and receive job offer notifications (eg when a job offer is accepted by the candidate)

   (3) Interview Panel – someone internal who will be on the interview panel, receiving interview scheduling notifications and interview feedback questionnaires

   *All Collaborators can view job applications and should be Grade UE07 or higher.

   If the person you are wishing to add is Grade UE06 or below and is not showing in the drop-down list it may be that they do not hold the collaborator system role. If you wish to add a collaborator you must submit a service request ‘Add Collaborator Role’ to get the role added for the person. Once allocated they will be available in the list.
10. Click **Continue** and section 4 **Requisition Structure** opens.

11. Complete the following fields in the **Requisition Structure** section:

   a. The **Recruiting Type** should be set to ‘Standard’ for all job requisitions except student posts, which must be set to ‘Student’
   b. Select the applicable **Organization**:
      o University of Edinburgh Group (first in list of 3)
      o Edinburgh Innovations Ltd, Edinburgh University Group (first in list of 3)
      o UOE Accommodation Ltd, Edinburgh University (first in the list of 3)
      o Edinburgh University Press Ltd, Edinburgh University Group (first in list of 3)
   c. Select the **Primary Location** for the role
   d. If it applies, select the **Other Locations** where the role is required to work

12. Click **Continue** and section 5 **Details** opens.
13. Complete the fields in the Details section with information relevant to the role, noting the following:

a. **Maximum Salary** and **Minimum Salary** should be logged on the job requisition but will not be pulled into the job posting description. The grade boundaries must be typed into the posting description manually

b. If the job is fixed term, please select a value from the **Fixed-term Reason** field

c. In the **Job Posting Requirements** field, specify where the job advert should be posted, eg internal only, external (includes internal), student site only

d. In the **Job Posting Comments** field, include additional information about the job advert, including the names of any job boards, start and end date/time for posting, etc.

e. Specify if there are any key hazards identified for the post in the **Health and Safety Requirements** field, adding any extra detail regarding these to the posting description

14. Click **Continue** and section 6 Work Requirements opens.

15. Complete the following fields in the **Work Requirements** section:

a. Select the applicable **Travel Required** option
b. Select the applicable **International Travel Required** option
c. Select the **Willing to Relocate** option
d. If the role is for a fixed term, enter the **Work Duration Months**
16. Click **Continue** and section **7 Posting Description** opens. The job description details are entered into the relevant fields.

If you have created a job requisition from a template, the posting description will be automatically pulled in from the template.

In order to edit the text that has been pulled into the Internal Posting Description, tick the **Enter Custom Internal Posting Description** checkbox:
Note: You can either text directly into the fields or copy and paste “plain text” from another source such as Microsoft Notepad. You can use the toolbar buttons to format the text to your requirements. To avoid formatting issues when the requisition is posted it is recommended that you do not copy and paste from Microsoft Word.

17. Complete the following fields in the **Posting Description** section to populate the information for the job advertisement:

a. Edit text in the **Internal Description** – a template is provided for this containing bold headings for key details and blank bullet points that must be completed.

b. If there is a different version of the job description for external candidates, click the **Same Description for Internal and External** checkbox to deselect it, and then update or enter text in the **External Short Description** and **External Description** fields.

c. Update or enter the **Name of Internal Contact** and **Email of Internal Contact** to be displayed on the job advertisement for internal candidates.

d. Update or enter the **Name of External Contact** and **Email of External Contact** to be displayed on the job advertisement for external candidates.
It is important to note that a Job Description cannot be attached to the posting information for the candidate to see. A hyperlink can be added to the posting details to a publicly available SharePoint site where Job Descriptions will be stored by selecting the link icon 📄.

Further guidance on how to add a job description to the requisition can be found in the Guidance for saving job descriptions to the job description library.

18. Click Continue and section 8 Offer Info opens.
19. Complete the following fields in the Offer Info section:

   a. Select the Legal Employer
   b. By default, the Business Unit is set to the option selected in the How section
   c. Select the applicable Department
   d. Select the Primary Work Location
   e. If applicable select Other Work Locations
   f. The Job field is populated by default from the option in the Basic Info section
   g. Select the applicable Grade for the role

20. Click Continue section 9 Attachments opens.
21. Upload a copy of the “Job Requisition Business Case” form:

   a. Click on the down arrow next to Drag files here or click to add attachment. Select Add Files and navigate to the location where the file is stored and select it.
   b. The file appears in the Attachments section.
22. Upload a copy of the Job Description to the attachments section.

23. Click Continue and section 10 Configuration opens.

24. In the Configuration section, make the appropriate selections for the following fields:

   a. **Candidate Selection Process**: Populated by default and can be changed if applicable. To read an explanation of the Candidate Selection Process options, go to Appendix 2.

   b. **External Application Flow**: Select the option External Apply Flow – EXT_APPLY_FLOW if the role is going to be advertised on the external careers site.

   c. **Allow Candidates to Apply When Not Posted**: Section the option No in most cases. However, if you have a select group or an individual that you want to apply for an unadvertised post, select “Yes.” The candidate(s) can be added to the requisition as a “prospect” and be sent an email containing a link to apply.
d. **Automatically Fill Requisition**: Select **Yes** so that the status of the job requisition automatically updates to “Filled” and closes when a candidate is hired. If the option remains set to “No” the requisition must be manually closed when someone is hired, otherwise it remains open.

25. Click **Continue** section 11 **Questionnaires** opens.

In this section of the application, the candidate answers either the preset **Internal Prescreening Questionnaire** or **External Prescreening Questionnaire** as appropriate.

To insert an extra question see the next step, or jump to step 27 to continue.
26. To add an extra prescreening question click on the down arrow in the **Add Question** field. Select your choice and it is appended to the end of the list of questions in the section.

27. Click the **Requires Response** checkbox if the candidate is required to answer the question. Repeat steps 25 and 26 until you have added the additional questions required.

28. So that the interview panel can provide feedback on the candidates, and to confirm who they think should be hired, click on the down arrow in the **Add Questionnaire** field and select **Interview Feedback Questionnaire**.
28. The final step, after you have reviewed the requisition details, is to submit it for approval. Authorisation is required before it can be posted onto the internal and/or external job boards. Jump to Submitting a Requisition for details.

Submitting a Job Requisition

On submission, a job requisition goes through a budgetary approval workflow process.

1. Within the requisition click the Submit button in the black banner, and after a few moments a prompt appears to confirm it has been submitted. (If the prompt does not disappear, click on the ∇ to close it.)

2. The Job Requisitions page opens and the requisition is listed with the status Approval – Pending to indicate it is now in the approval chain. It remains in this status until it has been authorised by all the Approvers.
3. When it has been authorised by the business approvers, the system automatically updates the status in the **Job Requisitions** page to **Job Formatting – In Progress**.

It is now possible to track how job requisitions are moving through the approval process by viewing banners displayed on the Overview and Details tabs of job requisitions. Job requisition initiators and approvers can also click links on these banners to get more details such as viewing the whole requisition or seeing who is the next approver in line, and to take actions on the requisition such as approving or rejecting the requisition or requesting more information.

Banners are displayed when:

- A job requisition is submitted for approval.
- A job requisition approval is underway.
- An approver requested more info about the job requisition.
- An approver needs to approve or reject a job requisition.
- The initiator needs to provide more info about the job requisition.

Simultaneously, an automatic email notification is generated to let the **Hiring Manager** and **Recruiter** know that the requisition has been approved.
When you click the Bell notification icon located at the top right in the Home page, a notification advises a “Job requisition… ready for job formatting.”

Click **Dismiss** to remove the notification.

4. HR Operations reviews the requisition and makes any necessary updates. Following this the requisition is posted to the internal career section and/or external job boards and candidates can apply for the role.

5. When it is posted, the system automatically updates the status in the **Job Requisitions** page to **Open – Posted**.
a) An automatic email notification is simultaneously generated to let the Hiring Manager and Recruiter know that the requisition is posted.

FYI: Job requisition Trainer - 178 posted

People&Money (DEV3) <ekow-dev3.fa.sender@workflow.mail3.oraclecloud.com>
Wed 09/09/2020 20:51
To: WILSON D <vdwl23@exseed.ed.ac.uk>

Hello

Job requisition Trainer - 178 has reached the Open - Posted status and is now posted for internal and external candidates.

View the internal job posting
View the external job posting
Access the job requisition: Trainer

Thank you.
b) When you click the Bell notification icon located at the top right in the Home page, a notification advises a “Job requisition… posted.”

c) Click Dismiss to remove the notification.

**Saving a Draft Job Requisition**

It is not necessary to complete the requisition all at once as a draft copy can be saved and completed later.

1. In the requisition complete the section that you are editing, ensuring that there is no data missing from mandatory fields.

2. Click **Save and Close** in the black banner.

3. The Job Requisitions page opens, and the requisition is listed with the status Draft – In Progress.

Simultaneously, the first time a draft requisition is saved, the system generates an automatic email notification to let the Hiring Manager and Recruiter know. Subsequent saves do not generate a notification message.
When you click the **Bell** notification icon located at the top right in the **Home** page, a notification advises a “New job requisition…” is assigned to you.

Click **Dismiss** to remove the notification.

**Editing a Draft Job Requisition**

A requisition in the status “Draft – In Progress” can be edited up until the point that you are ready to submit it for approval.

1. In the system, navigate to the **Job Requisitions** page and click on the applicable requisition in the status **Draft – In Progress**.

   or

   Click on the link in the **New job requisition** email and, provided you are already in the system, it is displayed. Otherwise, the Oracle login page is opened and the requisition appears after you have entered your User ID and password.
2. The requisition opens in the section **1 Basic Info**.

**Note:** The sections are renumbered as the original **1 How** is no longer available. You cannot change the requisition type and will need to create a new one if this is the case.

3. Click on the **Continue** button until you navigate to section that you want to edit or to continue working from.

4. To carry on creating the requisition, refer to the appropriate steps in **Creating a Job Requisition**.
Deleting a Job Requisition

1. To delete a saved job requisition which has not been submitted for approval navigate to My Client Groups then select Hiring

2. Click the ellipsis button and select Delete Job Requisition.

3. Click Yes to confirm
Cancelling a Posted Job Requisition

1. To cancel a job requisition navigate to Hiring and select the job requisition.

2. Click Action, then select Cancel Job Requisition.
3. Click **Yes** to confirm

4. If there have been applications to the requisition, continue to step 5 below
5. Select the applications link
6. Remove the filter showing only active applications

7. Click the checkbox to select all applicants
8. Select **Actions**, then **Send Message**

9. Click **Continue** in Candidates section
10. There is no template for rejection due to cancellation at advertising stage, therefore select the following settings and click **Continue**
   a. **Blank Message**
   b. **Adhoc Notification Template**

11. Type your message to candidates, inserting any relevant tokens as appropriate, then select **Continue**
12. Preview your message. If you are happy with the content select **Send**. To make any amendments, select **Edit** in the message section and repeat step 11.

Glossary

Please see the glossary
Appendix 1 – Job Requisition Use Types

<table>
<thead>
<tr>
<th>Use</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template</td>
<td>A Template contains information for a specific post, e.g. a Senior Lecturer and can be used whenever a request for the role is required. A template enables Hiring Managers and Recruiters to create a job requisition that already includes attributes such as the Job Family, Job Function, Department, Grade, and, importantly, the job description (Job Posting). Templates can be requested by raising a service request.</td>
</tr>
<tr>
<td>Position</td>
<td>Used to create a job requisition for a particular Position within the university (a specific instance of a job in a particular department) where there is a vacant post. Selecting this option means that some information is pre-populated in the job requisition, e.g. Job Family, Job Function, Department, Grade, etc. Use this option if there is no Template for the job you are recruiting for as some information is provided. See PM-1016 for more information on requesting a new position.</td>
</tr>
<tr>
<td>Job</td>
<td>When Job is selected, minimal information is pre-populated in the job requisition and the user must ensure they know the department details. (This option is due to come into effect in Phase 3 when job model profiles are setup.) It is preferable to use Position as it contains more content.</td>
</tr>
<tr>
<td>Existing Requisition</td>
<td>Populates the requisition with the content from an existing job requisition, such as the Grade, Department, Posting Description etc. Details can be amended as applicable.</td>
</tr>
<tr>
<td>Blank Requisition</td>
<td>It is recommended that “Template” or “Position” is used to create a new job requisition as these populate the requisition with some data. However, this option should be used if you want to advertise multiple jobs (spanning multiple grade boundaries and Positions) in one job advert. There is no content in a blank requisition and the user is required it to enter accurate details relevant to the role.</td>
</tr>
</tbody>
</table>

Appendix 2 – Candidate Selection Process

<table>
<thead>
<tr>
<th>Process</th>
<th>Process Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard_Candidate Selection Process_002 - Standart_CSP_002</td>
<td>This option is for standard job requisitions where an offer letter is extended to the candidate.</td>
</tr>
<tr>
<td>Pipeline_UoE_Candidate Selection Process – UoE_CSP_002</td>
<td>This option must be used for any pipeline job requisition.</td>
</tr>
<tr>
<td>Bypass Extend Offer_002 - Bypass_Offer_CSP_002</td>
<td>This option is used for standard job requisitions where an offer letter is not extended to the candidate. This should be selected if creating a requisition for an internal secondment.</td>
</tr>
</tbody>
</table>
### Appendix 3 – Business Justification Reason

<table>
<thead>
<tr>
<th>Business Justification</th>
<th>Posts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Externally Funded</td>
<td>Those that have no implications for internal funding</td>
</tr>
<tr>
<td></td>
<td>Note: the Head of School is accountable for research grant sign off and associated resourcing decisions with the approval step being undertaken by the Director of Professional Services on behalf of the Head of School. This approval task can be delegated to the relevant finance administrator</td>
</tr>
<tr>
<td>Chair recruitment</td>
<td>Follows normal approval but has additional step of approval to Principal. (this approval relates to providing relevant details (including advert, further particulars and proposed attraction strategy) with regard to the Chair and also the composition of the Special Committee and the selection panel. This will not be a formal approval step through the system. It is possible to add the Principal as a collaborator on the requisition to provide visibility of this information or this requirement can be met with offline processes). Notification to Head of Court Services will be managed through reporting.</td>
</tr>
</tbody>
</table>
| Internally funded | * New post (> 6 months)  
* All Clinical posts  
* All envelope submissions (New and Increases) incld GH  
If more financial controls are needed i.e. approval on each vacancy within an envelope a standard requisition should be used for each GH post.  
* Restructure/Reorganisation (New Roles)  
* All Replacement posts  
* Secondments  
* All Temporary absence cover  
* UE10 posts |
| Internally funded: minimal financial impact | * Student experience envelope  
* New post (< 6 months) |
| Casual recruitment | |
| Subsidiary Recruitment | Edinburgh University Press Ltd  
UoE Accommodation Ltd  
Edinburgh Innovations Ltd |
| Pipeline Requisition | Requisitions that cannot be appointed to but are used as a means of proactively gather candidates who have the skills, background, and experience we are looking for. These candidates can later be added to a standard job requisition for which they can eventually get hired. |