



People and Money system

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk.

Hiring Manager Guide- How to schedule and manage Hiring Team Managed Interviews

Hiring Manager/ School/Department Administrator

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

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

There are two types of interviews:

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

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

- In Person
- Phone
- Web conference

This guide covers Hiring Team Managed Interviews. For details of how to set up a Candidate Managed interview please refer to the guide [‘How to schedule and manage Candidate Managed interviews’](#).

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

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

If the candidate cancels their interview and does not plan to reschedule, the state should be updated to **'Withdrawn by Candidate'**.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

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



Quick Links to Detailed Steps

[Create an Interview Schedule](#)

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

[How to reschedule an interview](#)

[How to update the candidate status](#)

[How to cancel an interview](#)

Appendices

[Example of invite email sent to candidates](#)

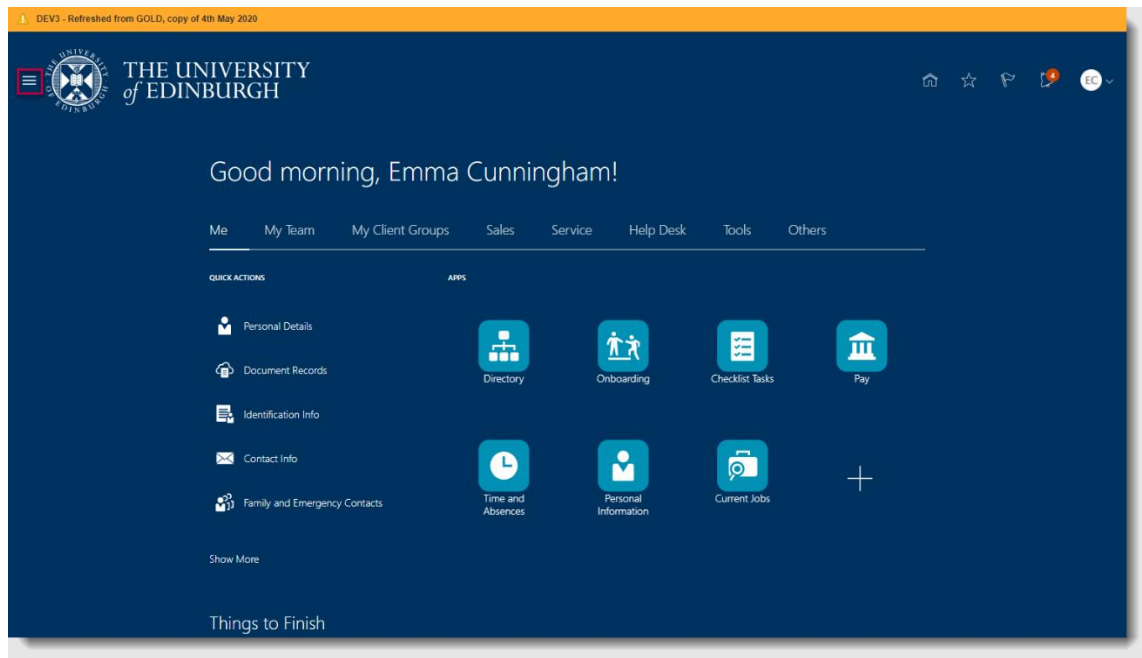
[Example showing the notification sent to the hiring team for an arranged interview](#)

[Example showing what the candidate sees when they click on interviews scheduled within their candidate profile](#)

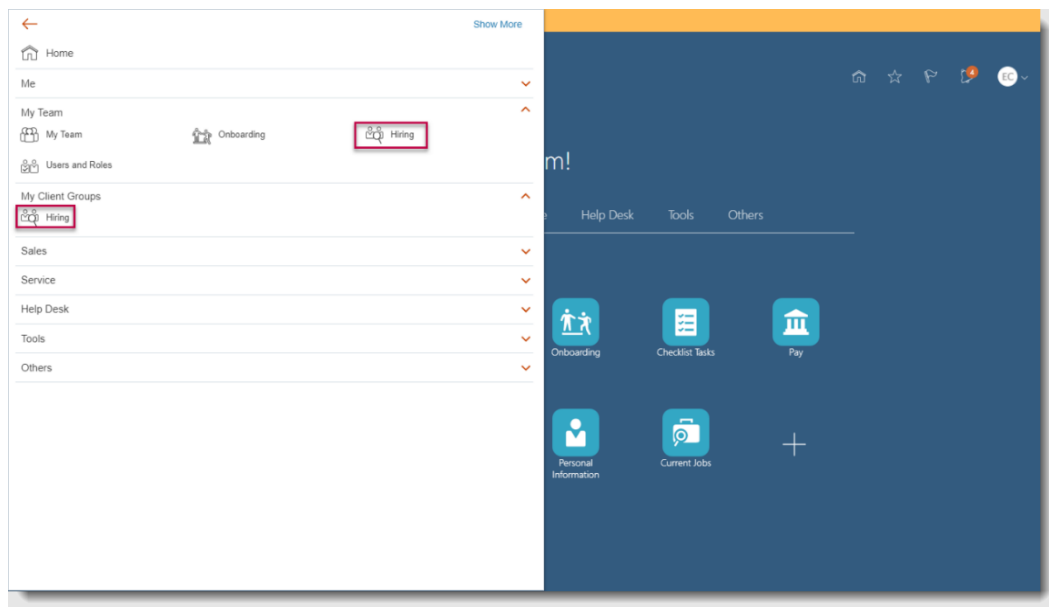
In Detail...

Create an Interview Schedule

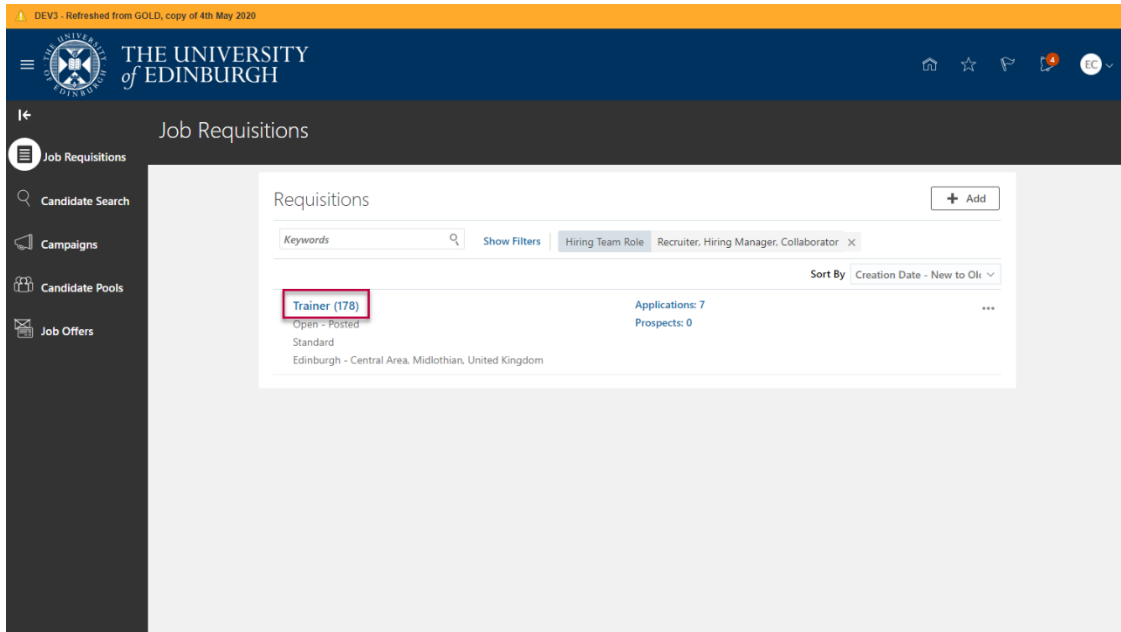
1. From the Home page, click the **Navigator** menu on the top left icon.



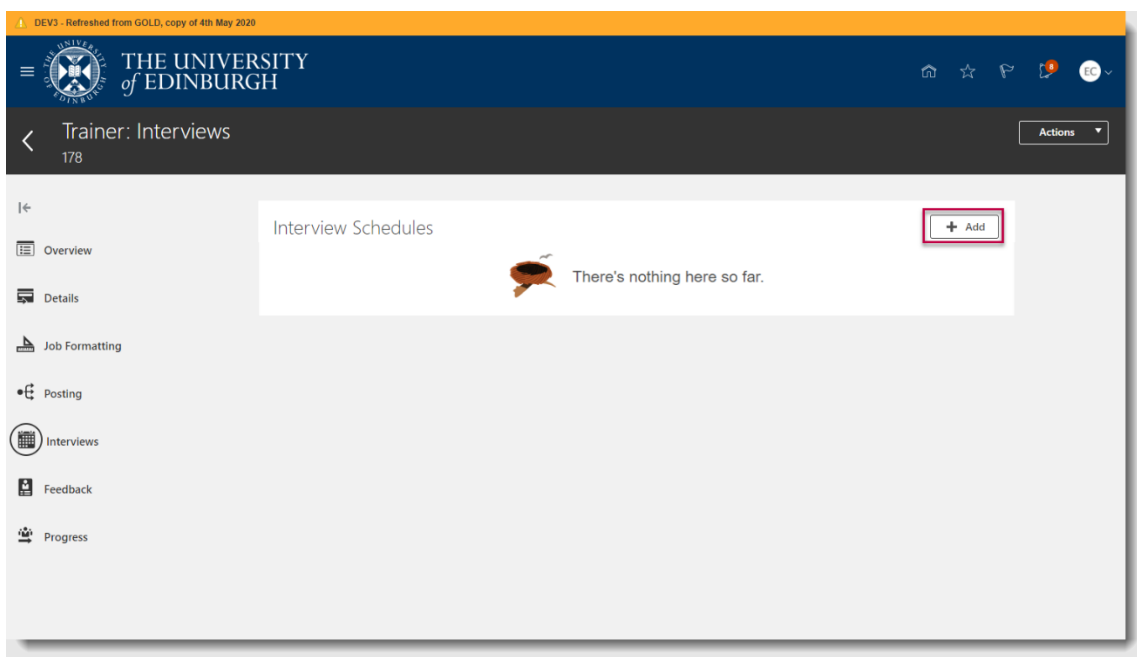
2. Expand **My Team/My Client Groups**, then click **Hiring**.



3. In the **Job Requisitions** screen, select the job requisition you want to set interviews for.

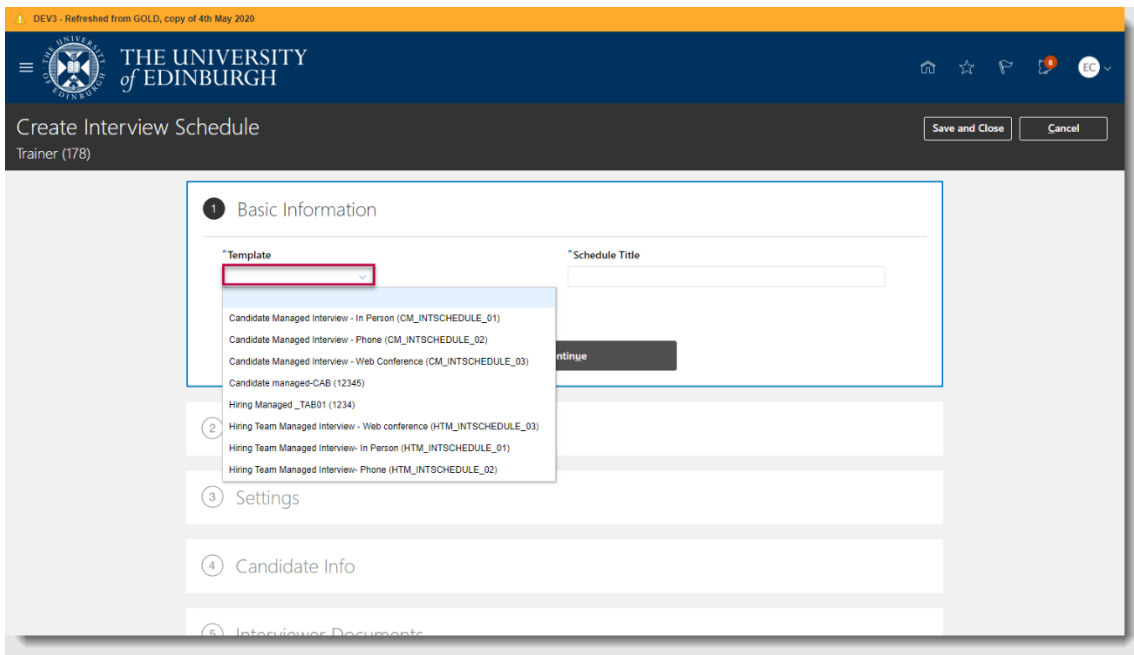


4. Click the **Interviews** tab then click **Add**.



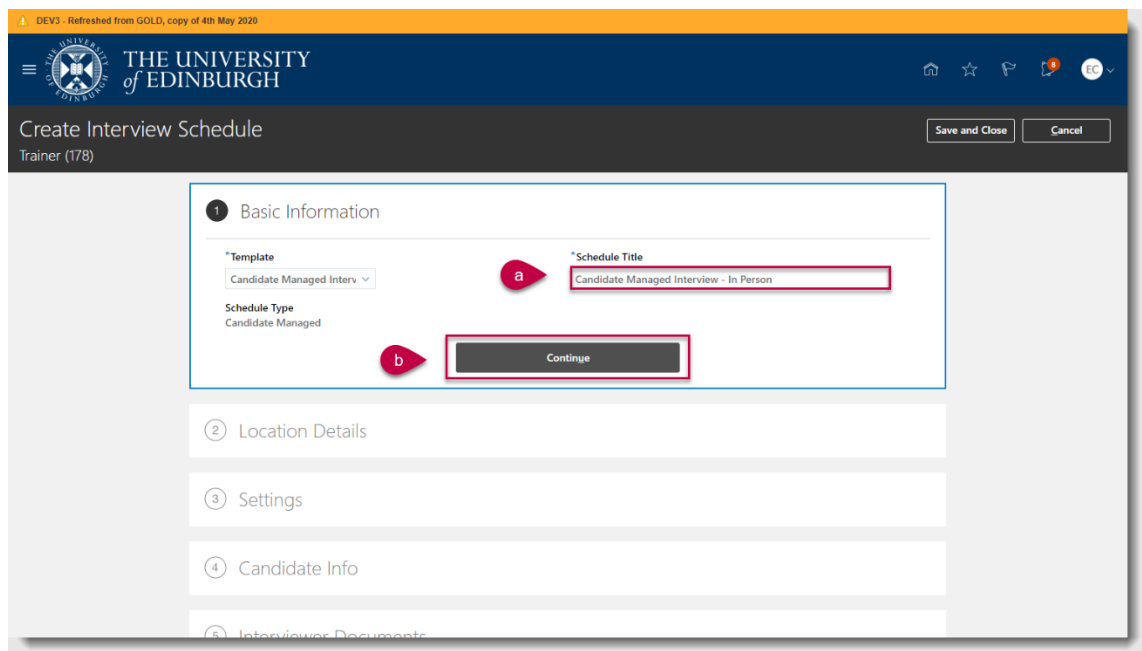
5. In **Create Interview Schedule** screen, select the appropriate **Hiring Team Managed** interview schedule template

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

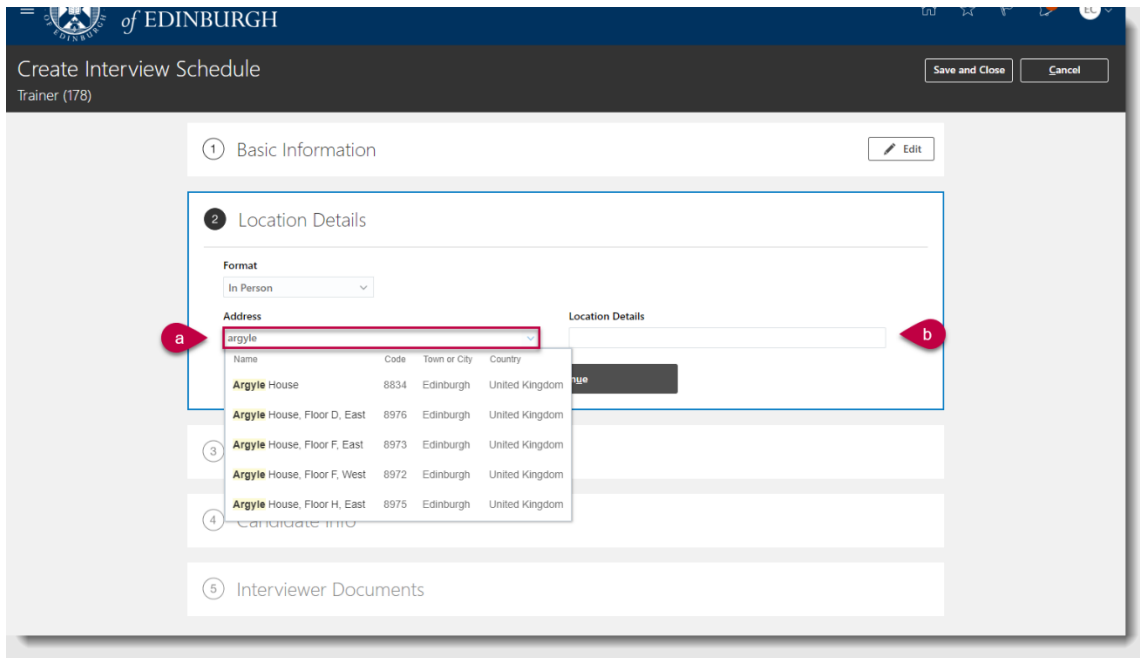


Confirmation will display on screen that the template details have copied to the schedule

- The **Schedule Title** will auto-populate with the name of the template selected. Amend this to something more meaningful if you are setting multiple interview templates for the same requisition e.g. you may wish to add the date of the interview DD/MM/YY at the end, then select **Continue**.



- Add appropriate **Location Details**. Then click **continue**

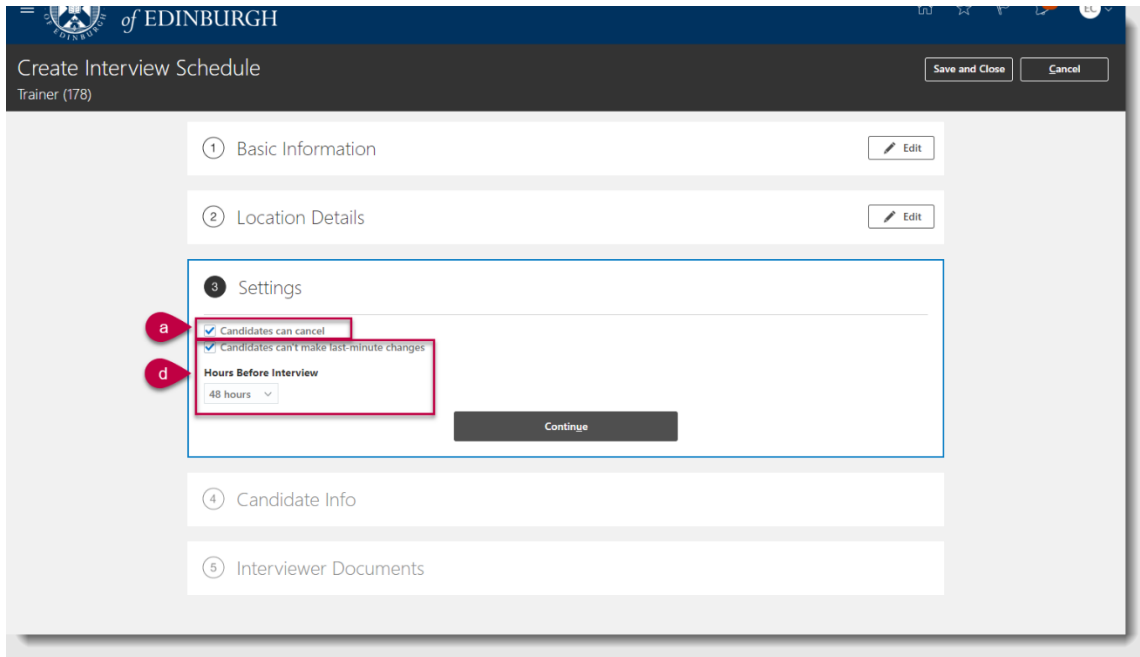


For In-Person interviews you can enter an **Address** and any additional **Location Details** e.g. meeting room number or floor. To enter a university location, begin typing the building into the address field and select the option from the search options provided (see above)

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

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

8. Review and make changes to **Settings** as appropriate. Then click **continue**



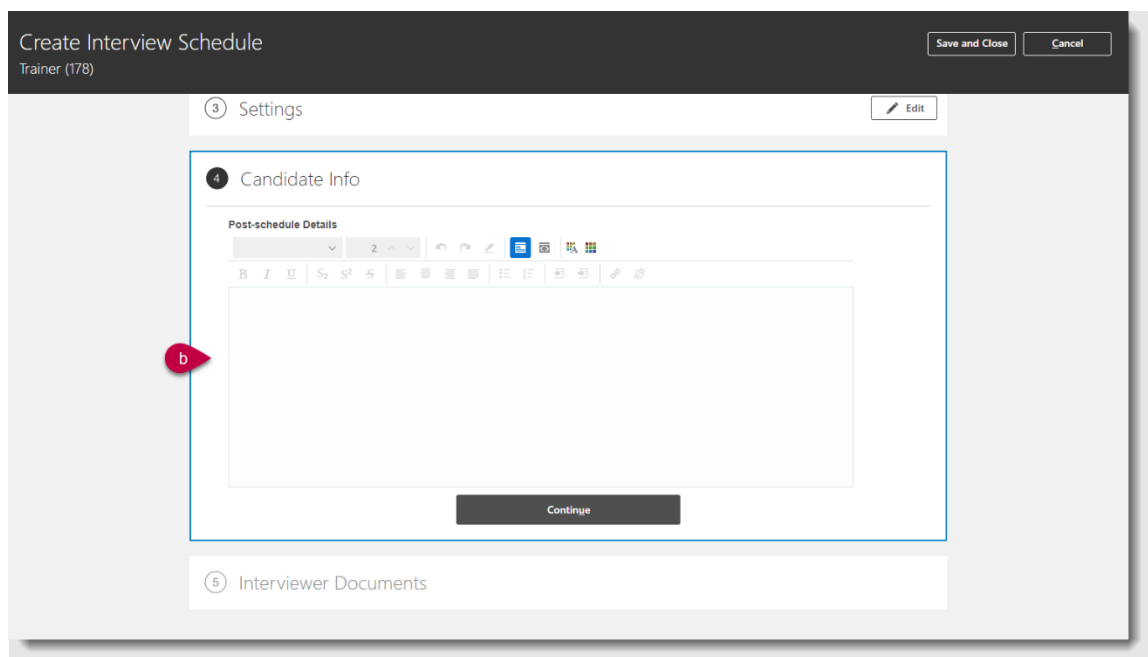
a) Candidates can cancel – ensure this box is ticked

- b) Select/Deselect the **Candidates can't make last minute changes** checkbox as required. If this is selected, the **Hours before interview** field can be used to select the length of time before the interviews that changes will be unable to be made. (Options include 1 hour, 2 hours, 4 hours, 8 hours, 12 hours, 24 hours, 48 hours).

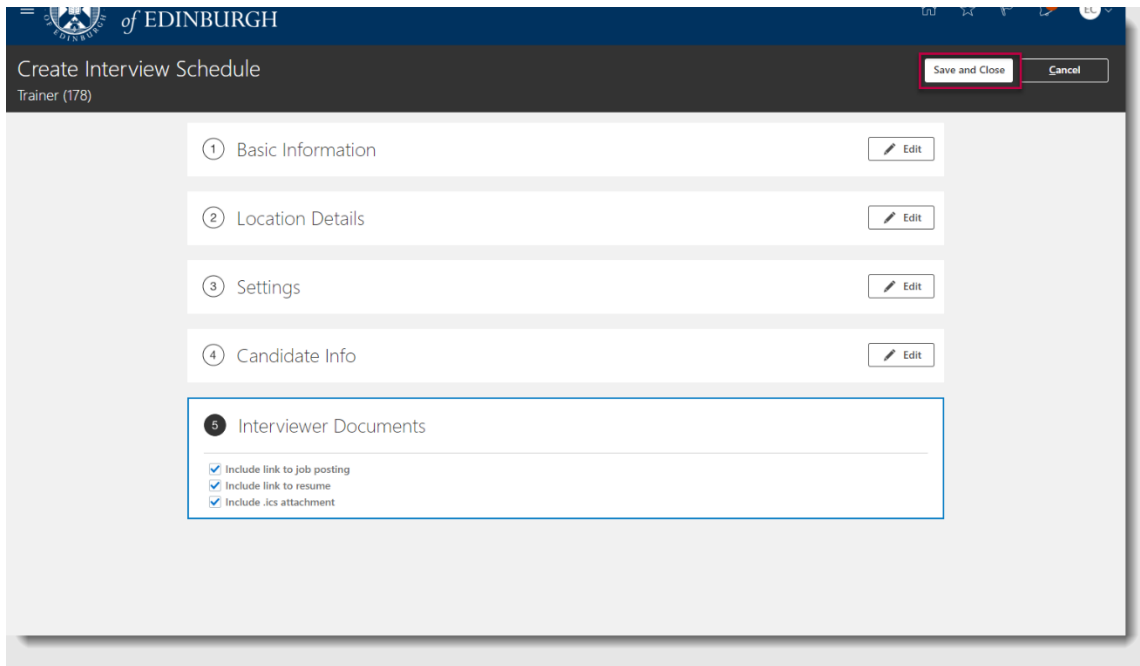
9. Make changes to **Candidate** info, if needed. Then click **continue**

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

Once the candidate responds, the hiring team should update the candidate's status accordingly, for example "Interview – Accepted Invitation." This section can also be used to include extra info, like interview location directions, contact person on arrival, or web conference instructions. The text will be included in the interview invite email. An example of the interview invite template is included in the [appendices](#) for reference.



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

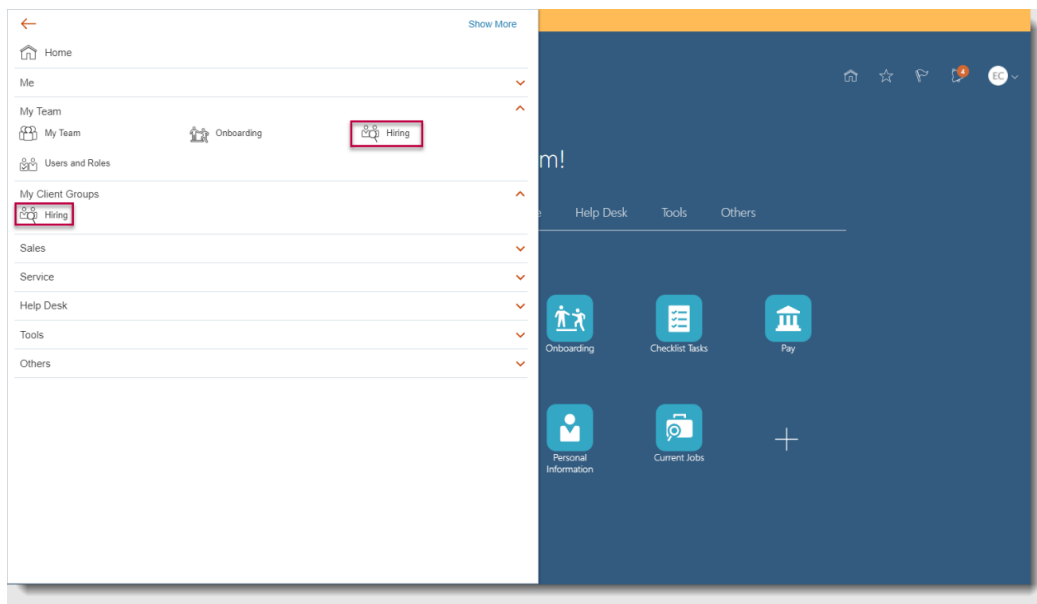


Selecting **Include link to job posting** and/or **include link to resume** will include a link to these documents in the notification sent to the hiring team to access these documents.

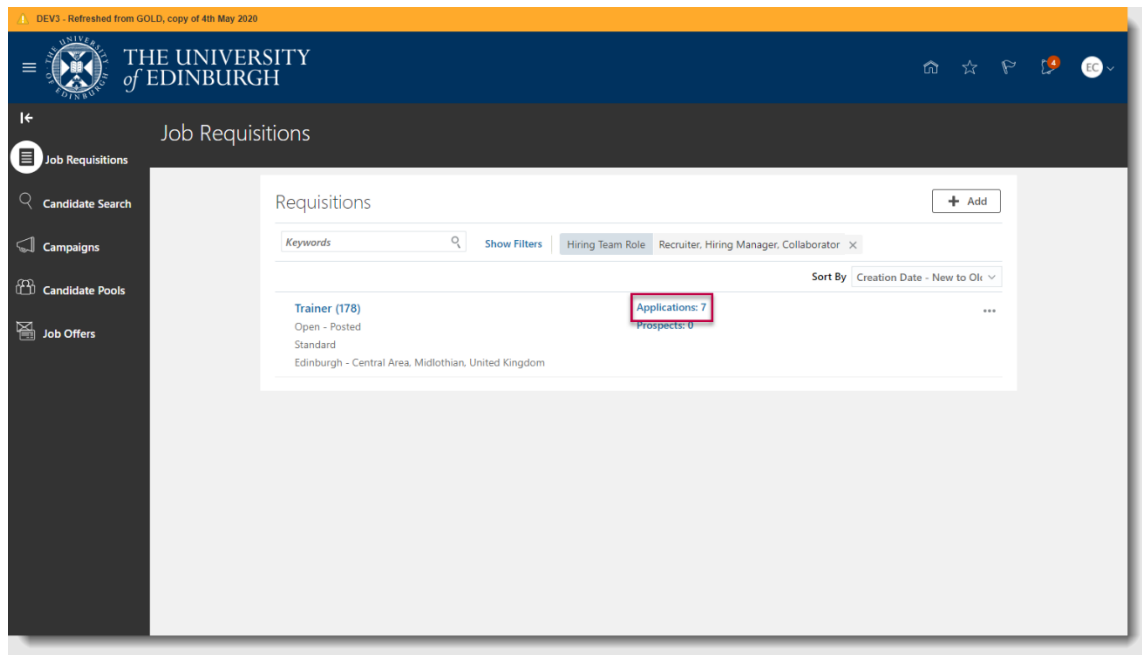
Selecting **include link to .ics attachment** will allow the hiring team to add the interview to their outlook calendar. See [appendices](#) for an example of the notification.


How to invite a Candidate to an Interview

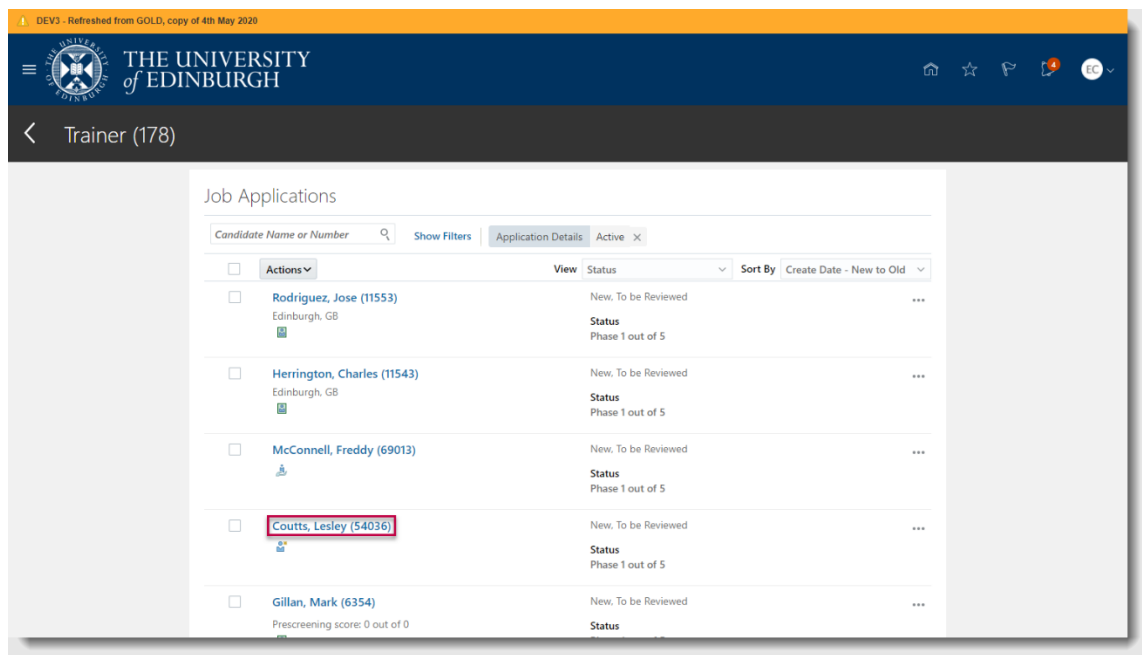
1. From the Home page, click the **Navigator** menu on the top left icon. Open the **My Team/My Client Groups** section and click **Hiring**.

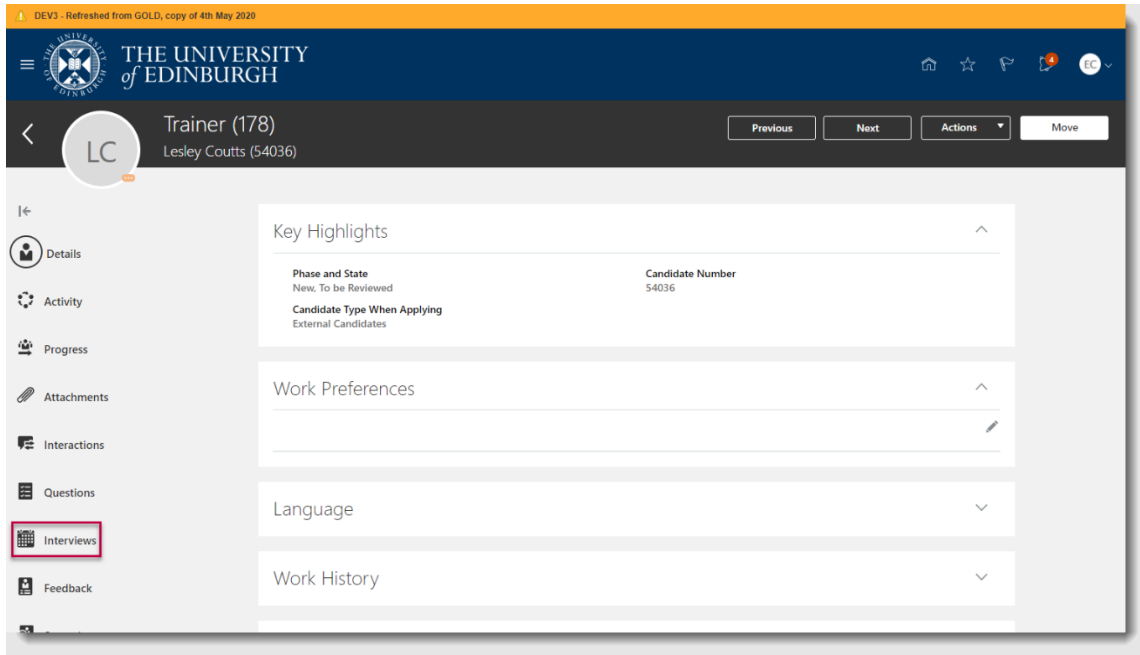


2. In the **Job Requisitions** screen, click the **Applications** hyperlink for the correct job requisition.

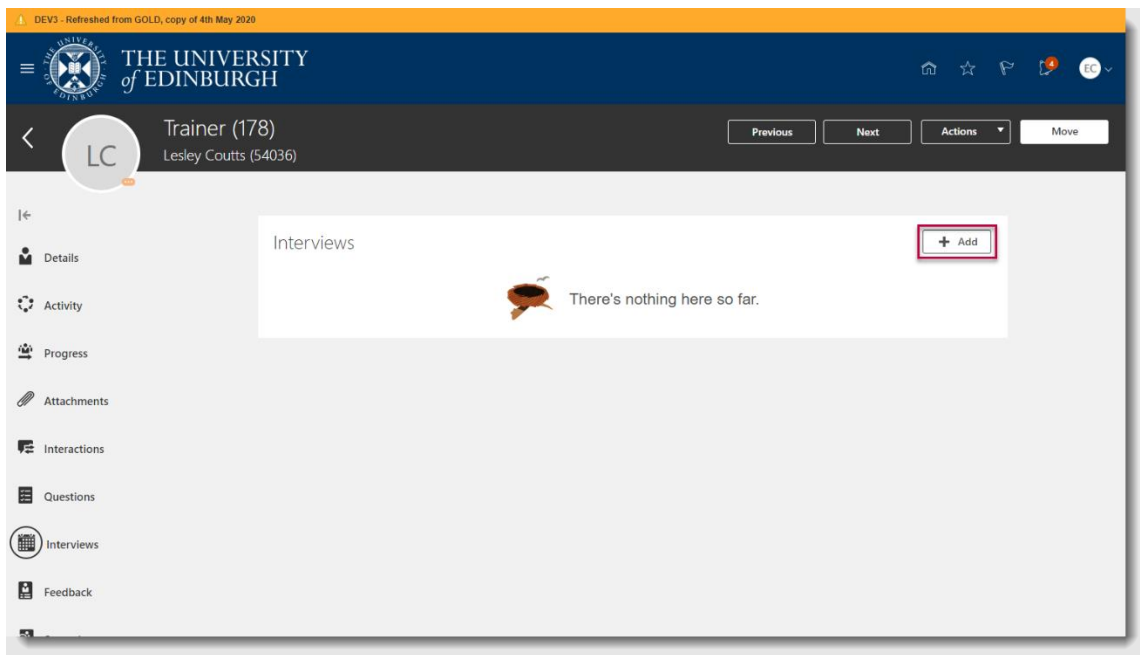


3. Choose the candidate and go to the **Interviews**  **Interviews** tab.

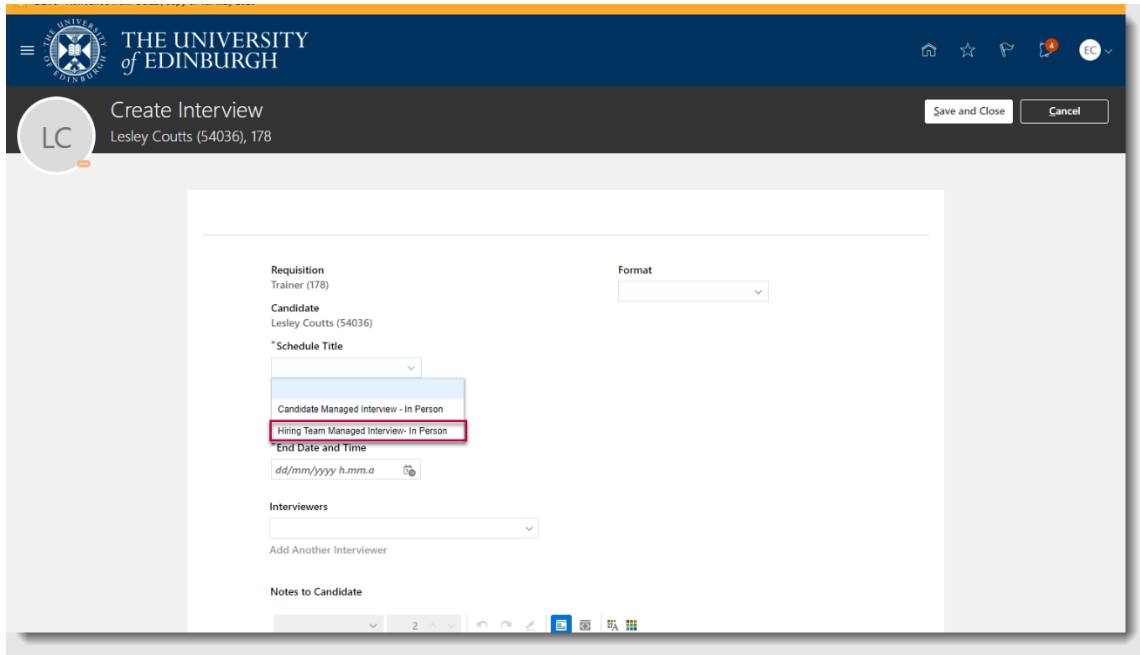




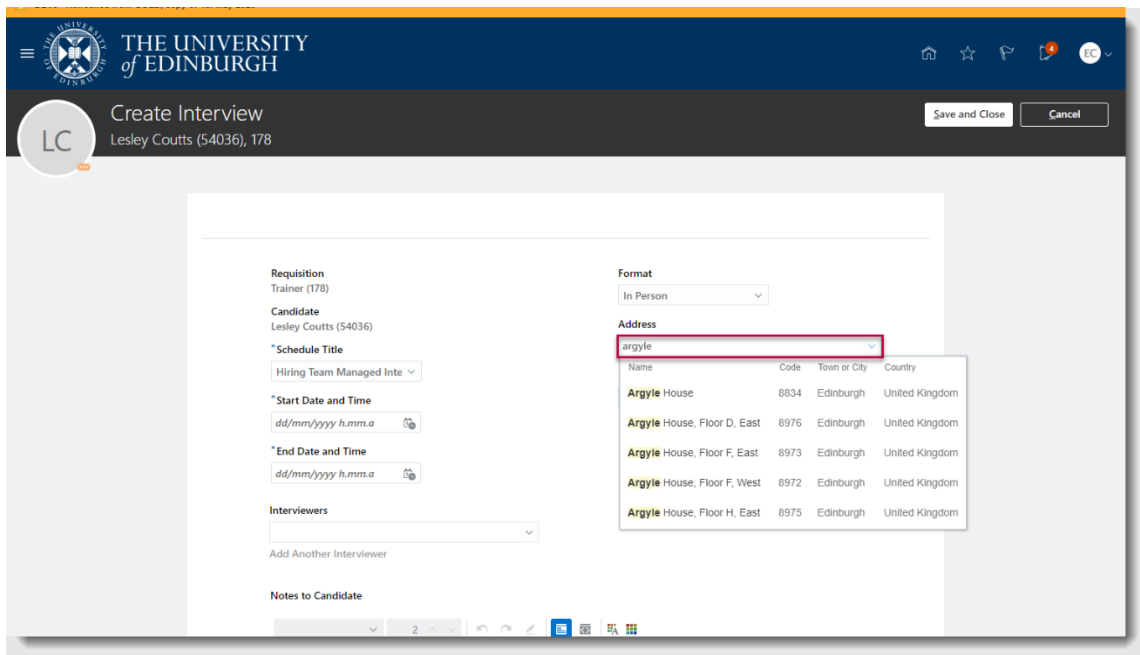
4. Click **Add** + Add to add **Hiring Team-Managed** Interview.



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



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

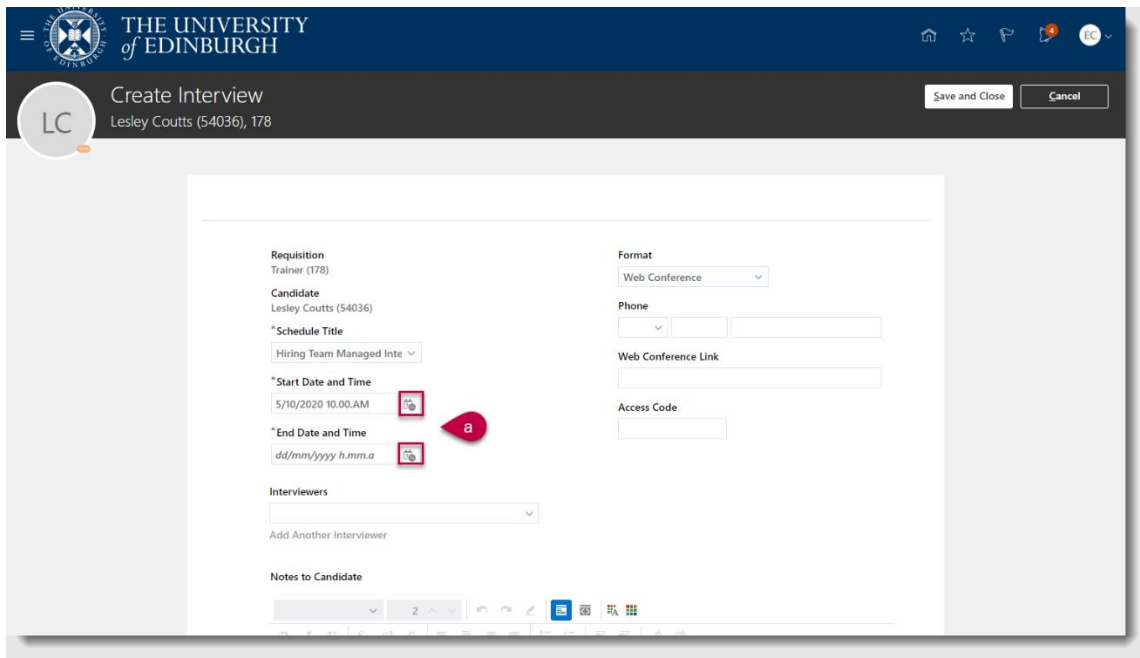


For In-Person interviews you can enter an **Address** and any additional **Location Details**. To enter a university location, begin typing the building into the field and select the option from the search options provided (see above)

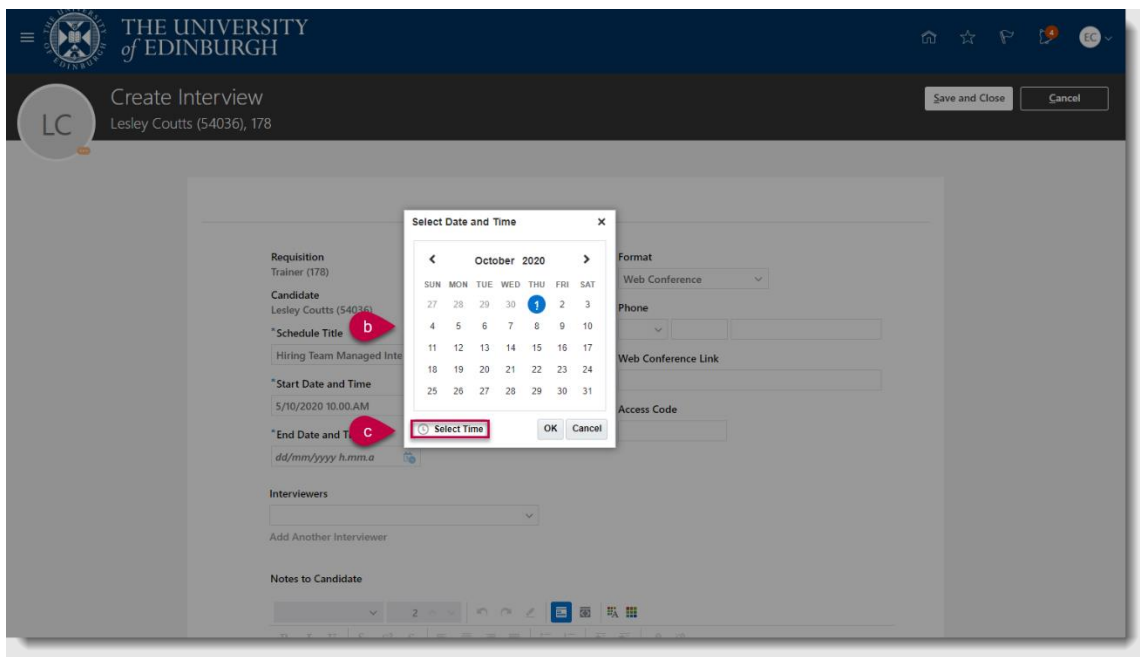
For Phone interviews, a **phone** number and **extension** can be added

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

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

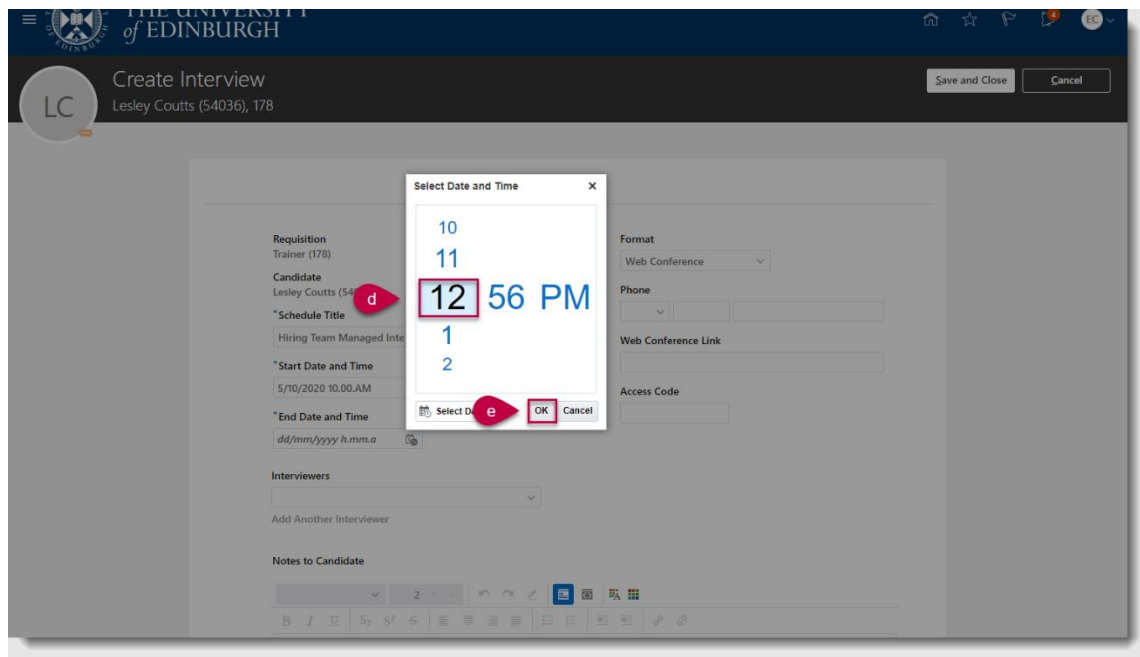


a) Select the **Calendar** next to the appropriate field



b) Select the date from the calendar

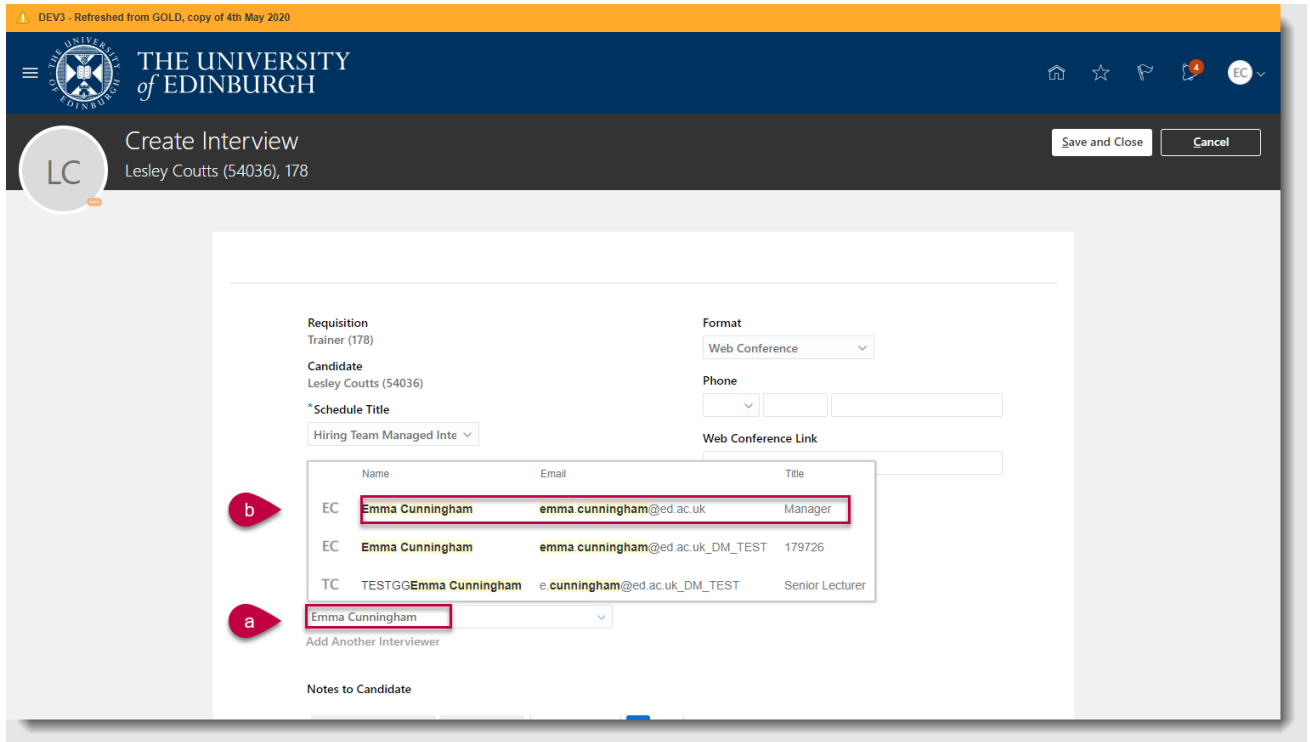
c) Click **Select Time**



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

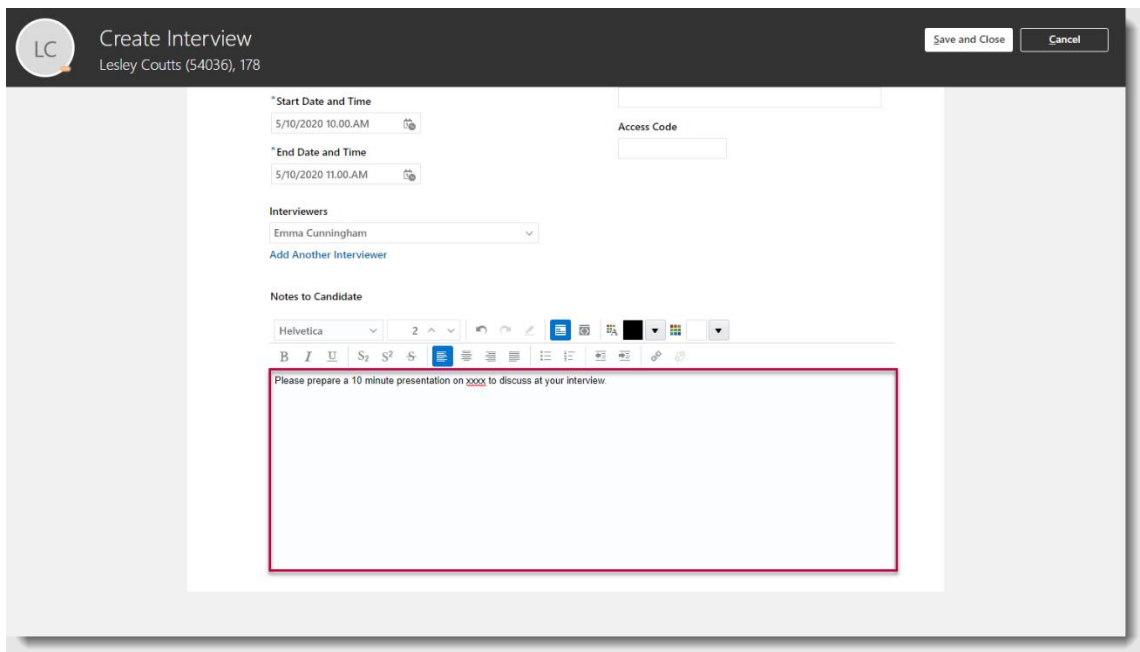
Time zone differences: The scheduled interview time may differ from what an external candidate sees within their candidate profile (accessed on the career site). This is because the time adjusts according to their local time based on the time zone of their browser. Additionally, the .ics attachment in the interview invite will initially show the UTC time, it is only when the .ics is added and saved to their calendar that their correct time zone is reflected.

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



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

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



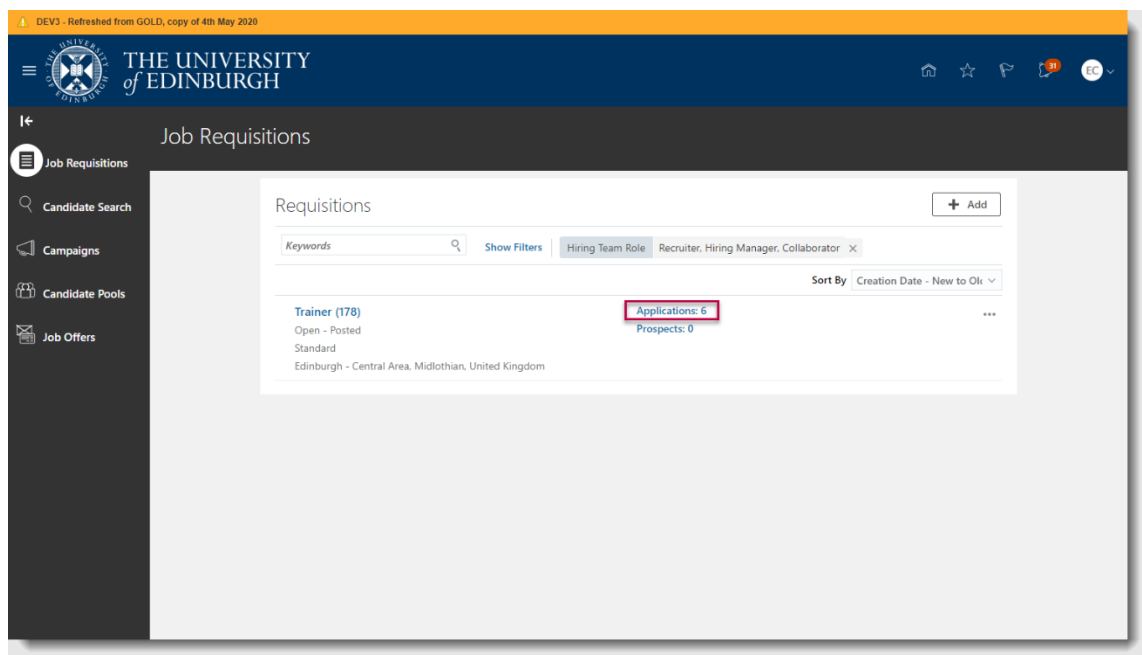
11. Click **Save and Close** to send the invite to the candidate. An email will be sent to the candidate as soon as save and close is clicked so make sure you have checked the accuracy of the information.

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

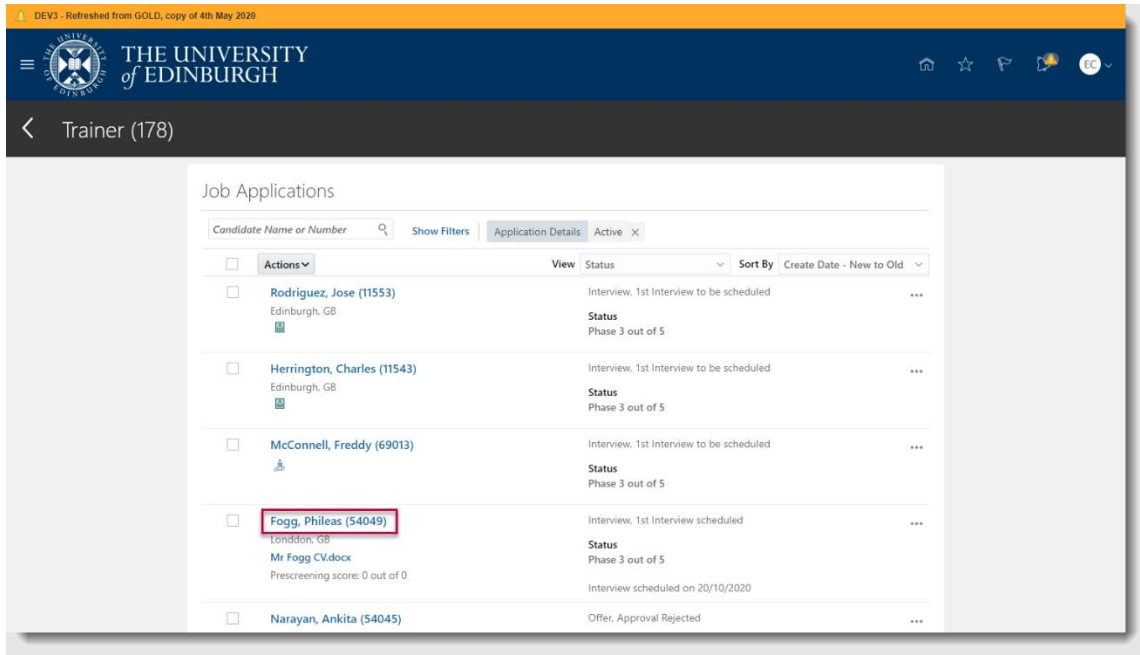
Once the candidate responds you should update the status further to reflect the candidates response e.g. accepted invitation / declined invitation / awaiting response.

How to reschedule an interview

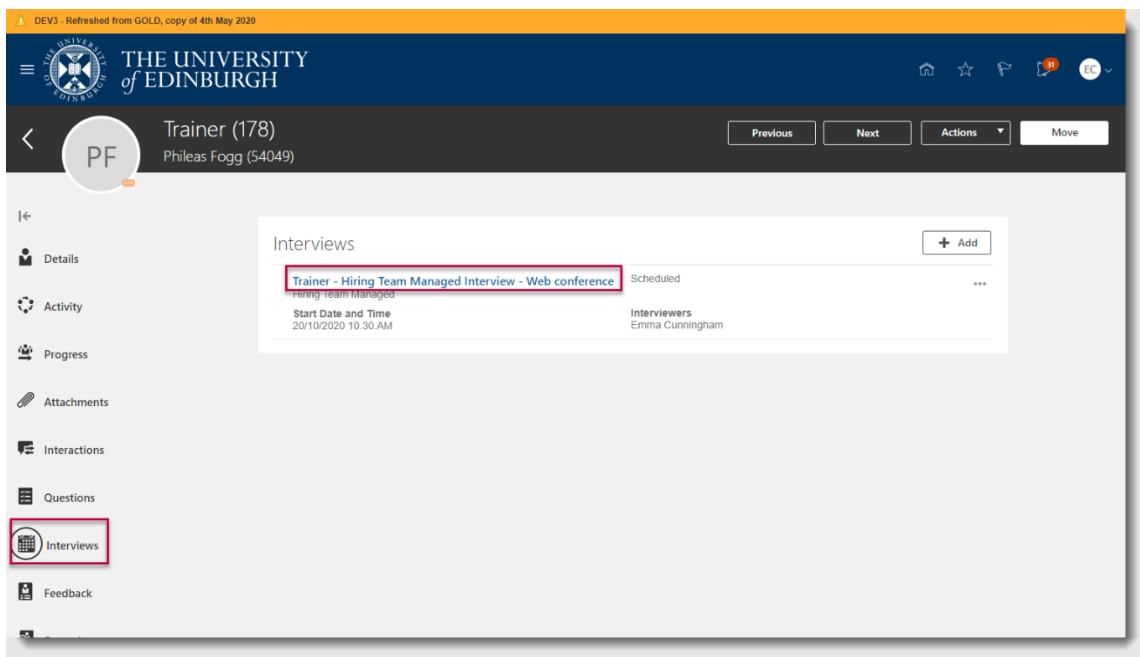
1. In the **Job Requisitions** screen, click the **Applications** hyperlink for the correct job requisition.



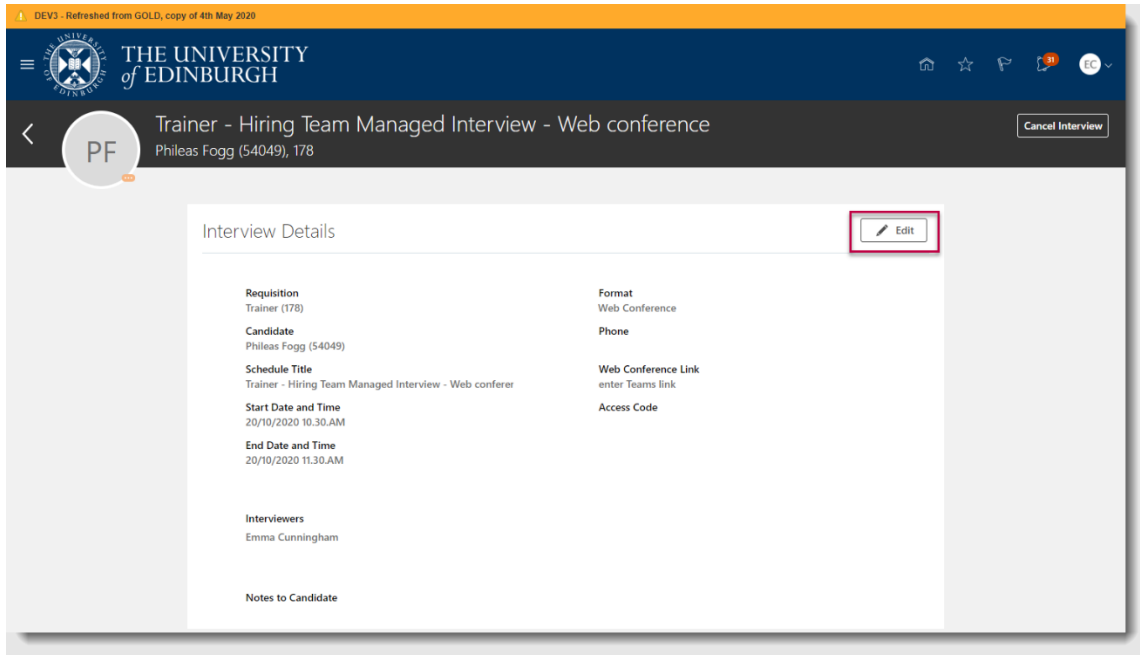
2. Select the appropriate candidate



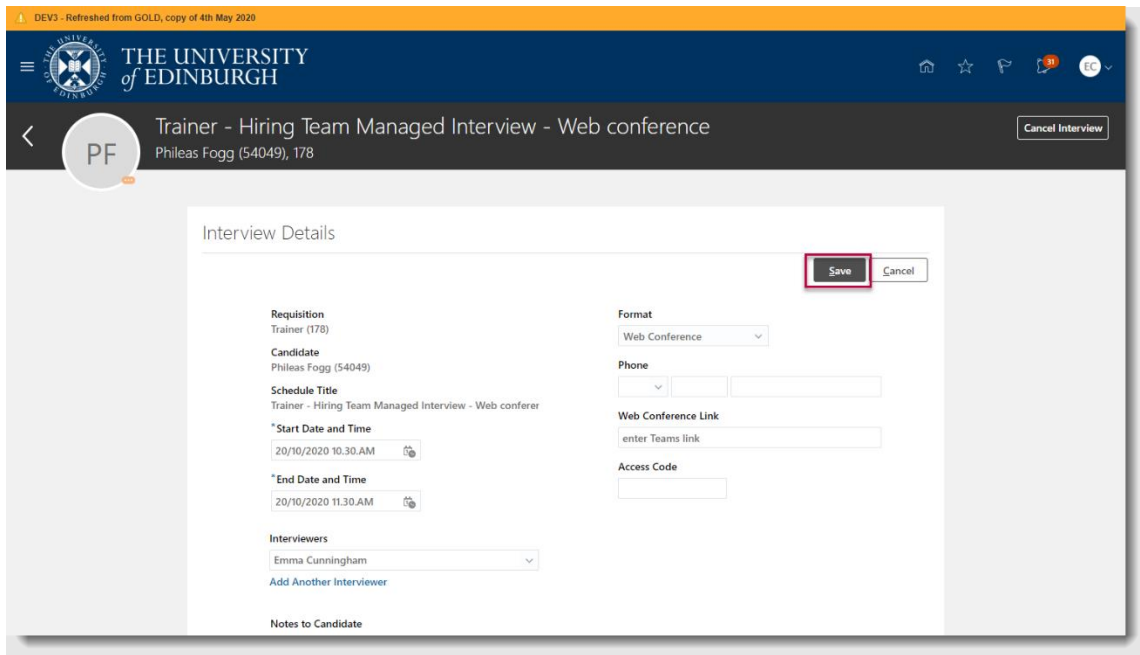
3. Select the **Interviews** tab then select the interview



4. Click **Edit**

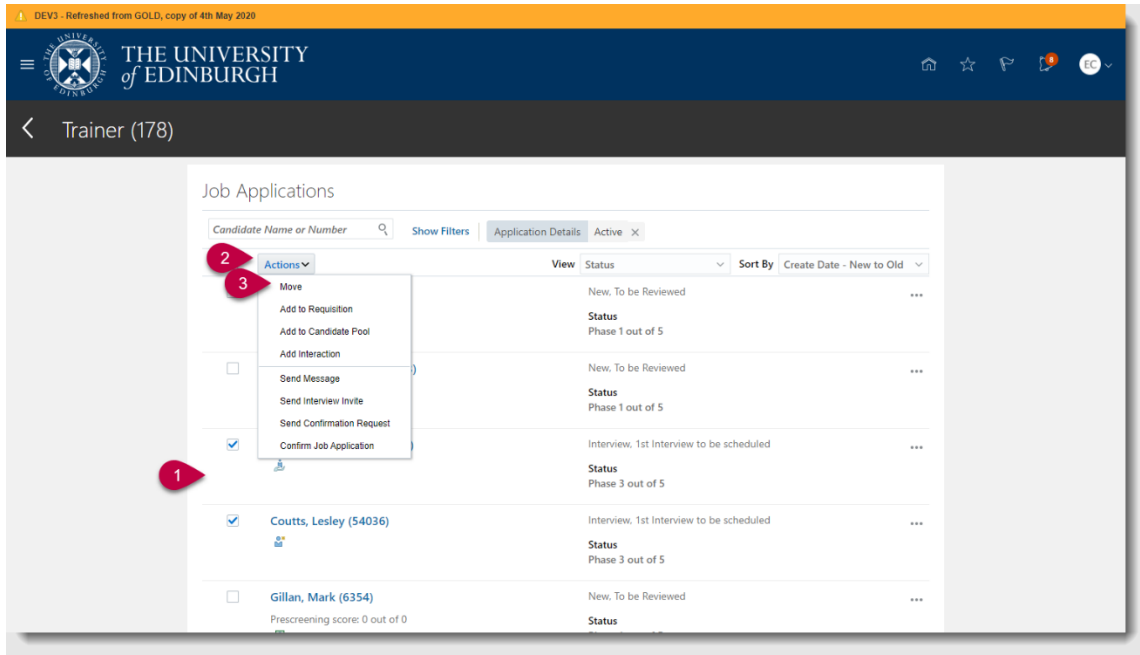


5. Make any required changes, then click **Save**, at this point the candidate will be sent an email advising that their interview has been updated. Members of the Hiring Team will also receive a notification advising them of the update.

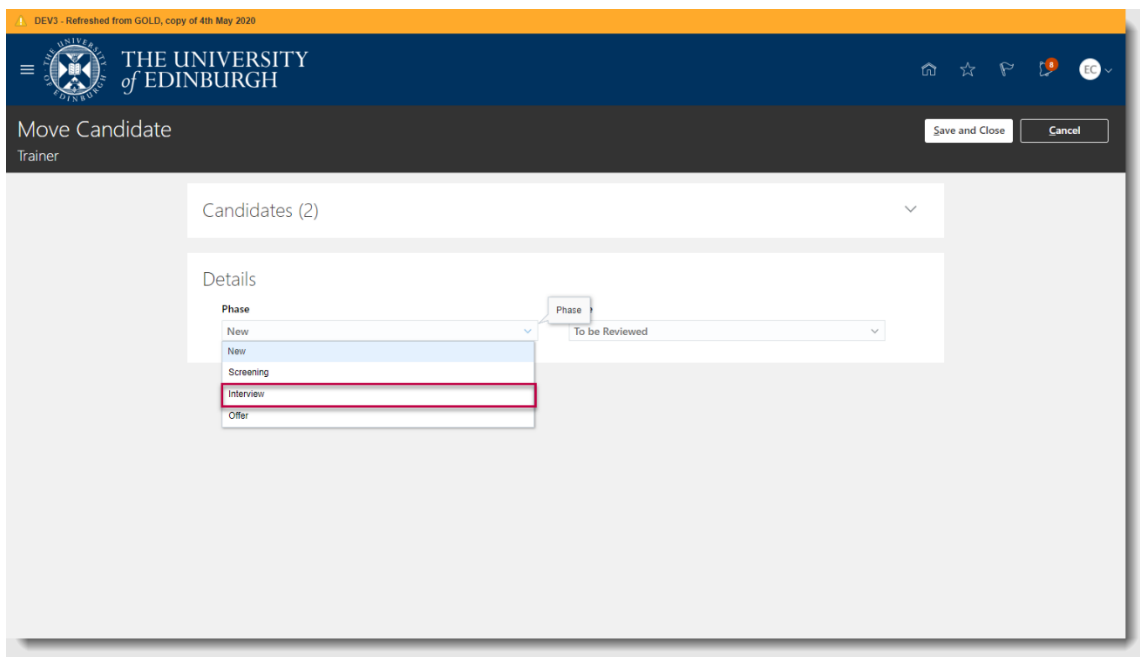


How to update the candidate status

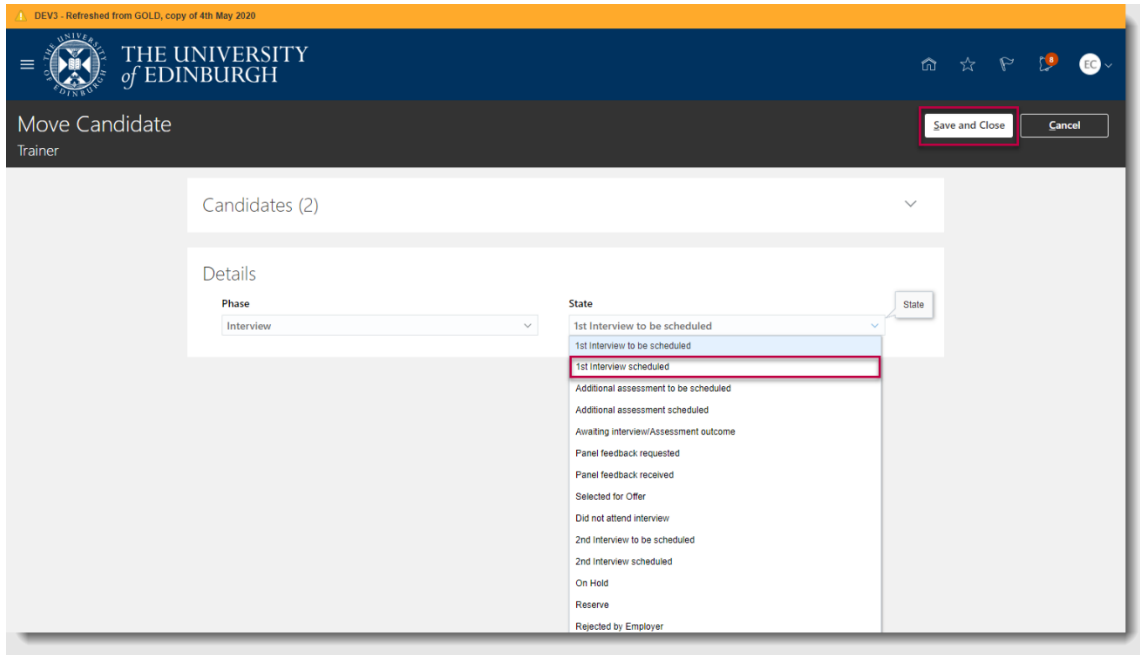
1. From the **job applications** screen select the **checkbox** next to the candidates' name, click **action** then select **move**



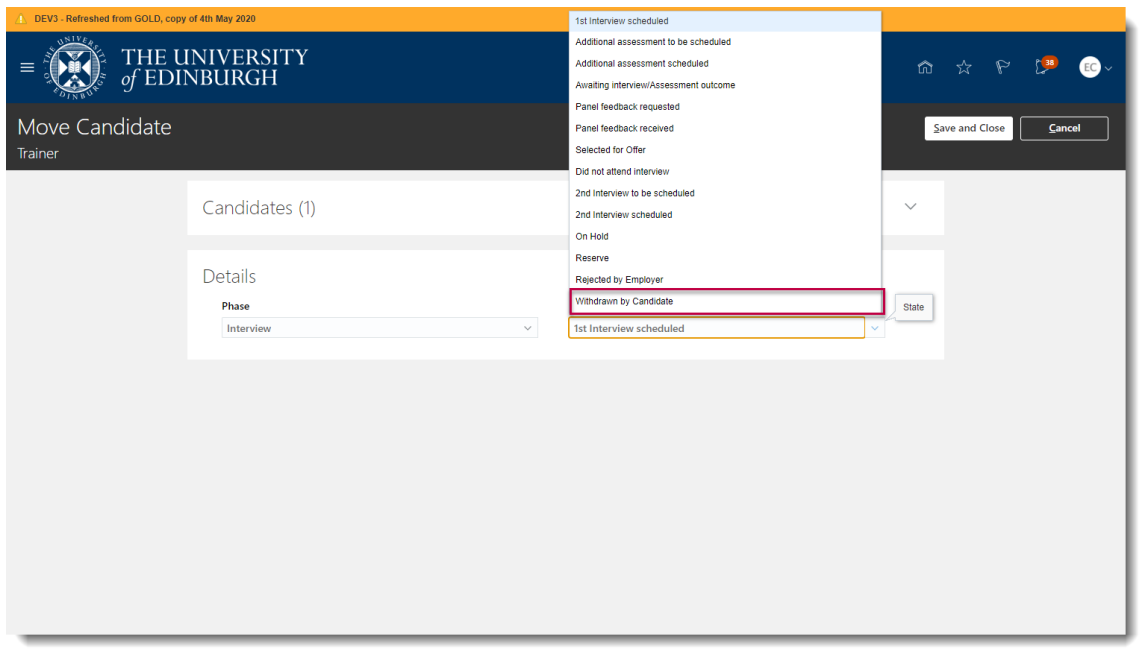
2. Use the **Phase** dropdown to select **Interview**



3. Then use the **State** dropdown to select **1st Interview Scheduled** then click **Save and Close**

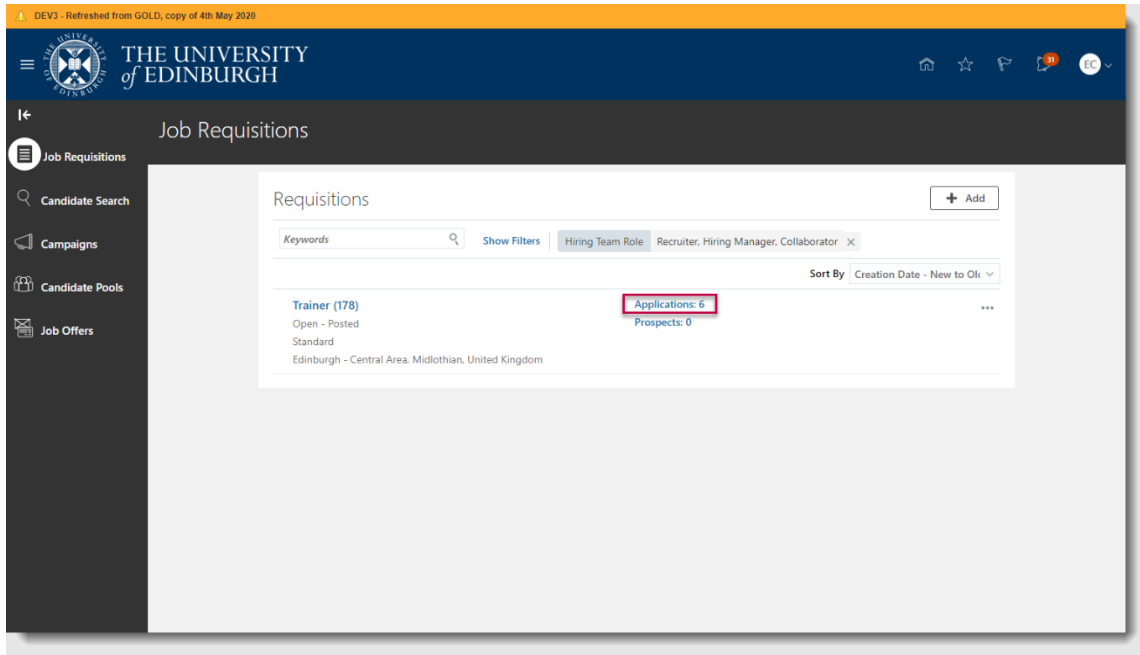


4. If the candidate cancels an interview and does not plan to reschedule, ensure you update the state to **Withdrawn by Candidate (within the New Phase)**

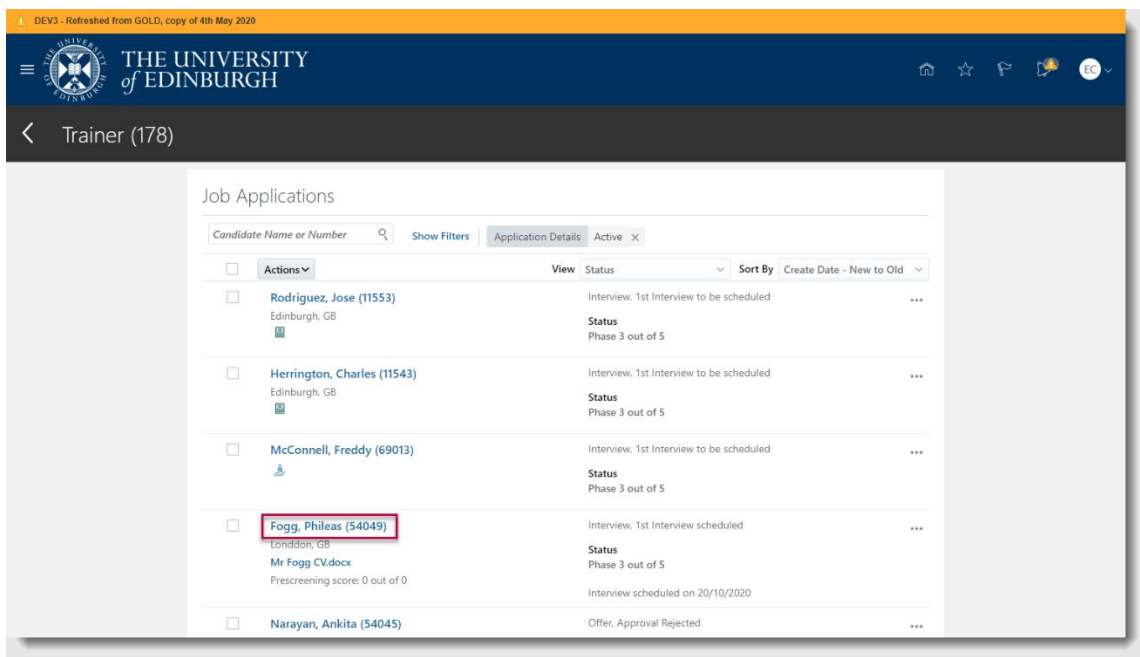


How to cancel an interview

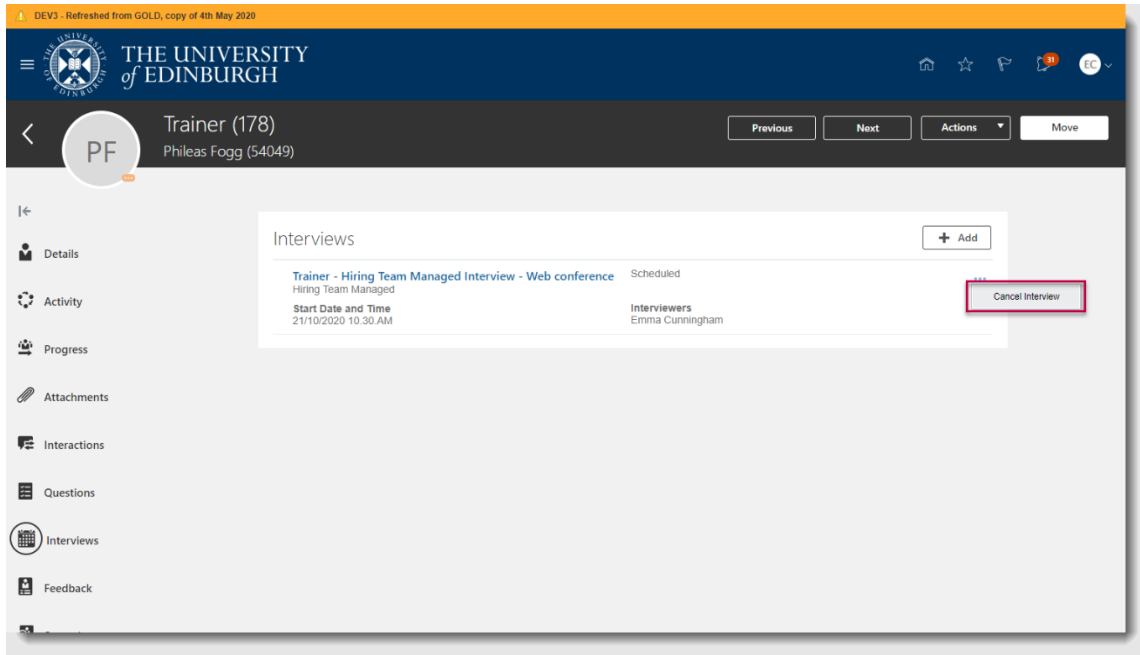
1. In the **Job Requisitions** screen, click the **Applications** hyperlink for the correct job requisition.



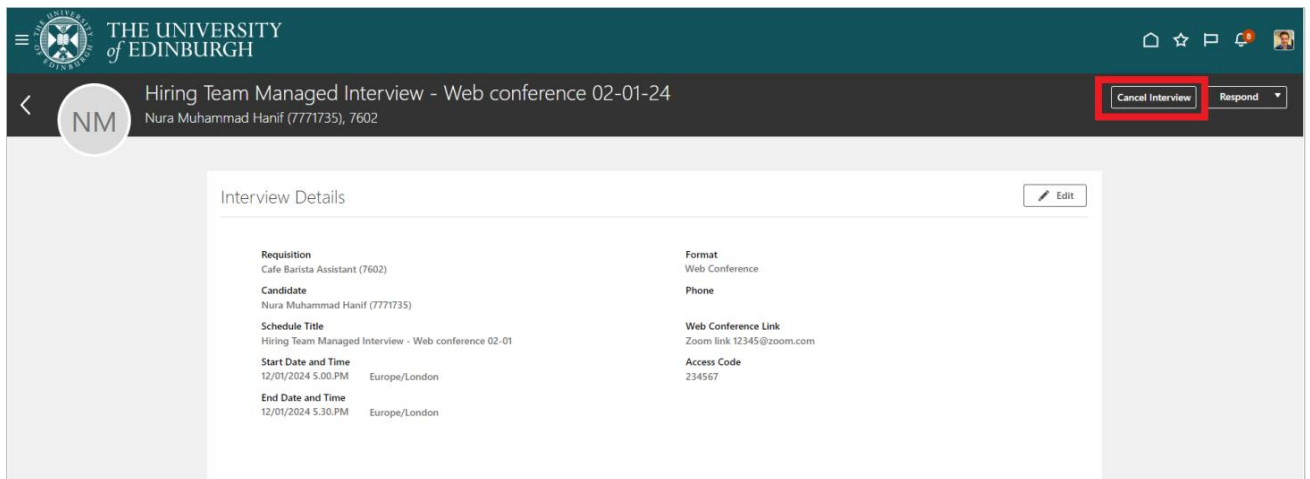
2. Select the appropriate candidate



3. Select the **Interviews** tab then click the ellipsis next to the interview and select **Cancel Interview**



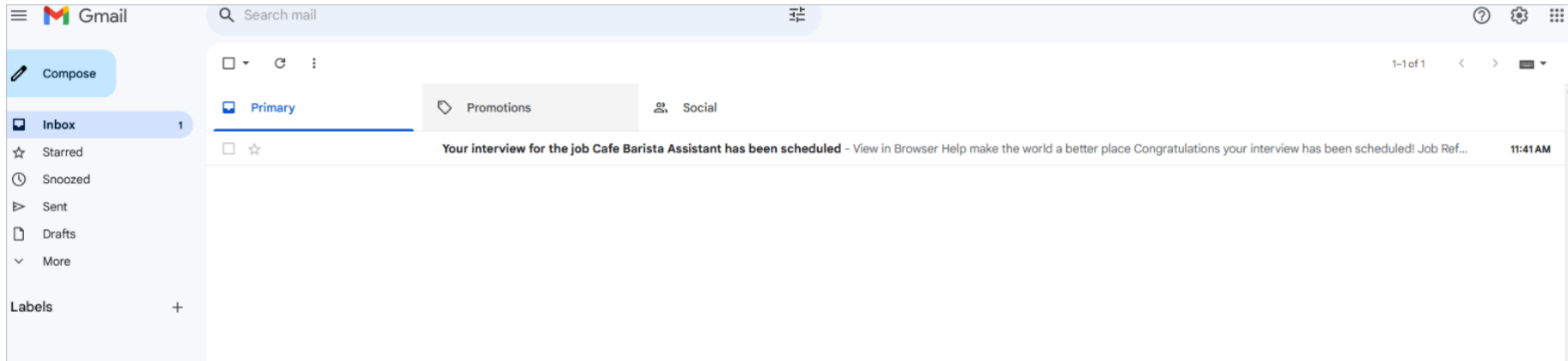
Alternatively, you can also click on the interview link and select to cancel the interview from this screen.



The candidate and hiring team are notified that the interview is cancelled.

Appendices

Example of invite email sent to candidates:



Note the post schedule details and candidates notes section highlighted red and yellow in the image below is for illustration purposes only, it does not appear this way to candidates.

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



to me ▾

11:41 AM (3 minutes ago) ☆ 😊 ↶ ⋮

[View in Browser](#)



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of EDINBURGH

Help make the world a better place

Congratulations your interview has been scheduled!

Job Reference: 7602

Dear Nura

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

Date and Time: 12/01/2024 [11.00 AM](#) Europe/London

Requisition: Cafe Barista Assistant

Interview Type: Web Conference

Interviewer(s): Craig Hennessy

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

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

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

Click to download a [calendar attachment](#) that you can add to your calendar.

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

Please confirm whether or not you are able to attend the interview by emailing Craig Hennessy on Craig.Hennessy@ed.ac.uk.

Right to work and qualifications

In accordance with the Immigration, Asylum and Nationality Act 2006 and the Immigration Act 2016 we have a legal responsibility to prevent illegal working and therefore must check that all employees are entitled to work in the United Kingdom (UK). To meet this requirement we must see original document evidencing right to work in the UK before commencement of

employment and this is normally carried out at Interview. This includes if you are already working with us as a contractor or agency worker.

Details of documents that provide evidence of a right to work can be found at:

<https://www.ed.ac.uk/human-resources/demonstrating-rtw>

If you are an existing employee you do not need to supply this information again at interview. If you are successful we will check your Right to Work status prior to sending an offer of employment. Please note you may be required to provide updated documentation at this point, for instance if you are on a time bound visa which is due to expire. Full details will be provided by HR prior to any offer being made.

If you do not have a pre-existing Right to Work in the UK or are at all unsure please bring your passport with you.

Please can you also bring with you original documents for your highest qualification(s), and any other directly relevant qualifications for this position. We will take a copy of your documents and hold these should you be successful. For all unsuccessful applications we will securely dispose of all the copies taken.

Adjustments to assist your interview

If you require any assistance to take part in the selection process as outlined above (e.g. an accessible venue or signer), please let me know your requirements and we will make every effort to provide assistance.

Expenses

If you are travelling from outside Edinburgh to attend interview we will

reimburse travel expenses, details of which are explained on the [expense form](#). Please ensure you retain original receipts in order to make your claim.

I wish you every success at your interview and look forward to welcoming you.

Kind Regards,

Craig Hennessy


This email is an automated notification, which is unable to receive replies.

You have control over your account: If you want to update your communication preferences, update personal details or delete your account you can do so within your profile. Visit <https://www.ed.ac.uk/jobs>

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

https://elxw-dev8.fa.em3.oraclecloud.com/hcmUI/faces/adf.task-flow?tz=Europe%2FLondon&df=medium&dt=both&tf=short&lg=en&cy=&bpmWo... A

Dismiss



THE UNIVERSITY
of **EDINBURGH**

Hello,

Here are the details of the interview that has been scheduled with [REDACTED]

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

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

You can access the candidates CV on this link: [CV Link](#)
Access the job description by clicking on the following link: [Job Requisition quick link](#)
Once on the requisition page, navigate to the details tab, open the Posting Description section, and click the provided link to view the complete job description.

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

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Hiring Team Managed Interview - Web conference 02-01-24

Cancel Interview Respond

Accept
Decline
Tentative
Propose a New Time

Interview Details

Requisition
Cafe Barista Assistant (7602)

Candidate
Nura Muhammad Hanif (7771735)

Schedule Title
Hiring Team Managed Interview - Web conference 02-01

Start Date and Time
12/01/2024 5.00.PM Europe/London

End Date and Time
12/01/2024 5.30.PM Europe/London

Format
Web Conference

Phone

Web Conference Link
Zoom link 12345@zoom.com

Access Code
234567

Edit

Example showing what the candidate sees when they click on interviews scheduled within their candidate profile (accessed via the Career Site)

🏠 | Schedule Interview

Your interview is scheduled. Here are the details.

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

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

[Cancel Interview](#)

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

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

[BACK TO MY PROFILE](#)