



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 [Guide to Employment and Finance Approvals](#) which outlines the University's budgetary approval workflow for raising job requisitions for hiring staff.

To prepare for creating a Job Requisition 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, job level and with available FTE. See the [Guide to Job Classifications and Position Management](#) for further details.
- Create a [Job Requisition Business Case form](#) which will support the approval process.
- Use the [Job Advert template](#) to draft the posting description – agree if the job can be considered for hybrid working or on campus.
- **If you plan to advertise the job externally** using Penna you must raise a Purchase Order (PO) and include this in the Job Posting Comments. Please read the [Guide to External Advertising](#) for further information on how to request a PO. The PO provided on the job requisition must be in the following format UOExxxxxxx (7 digits).
- 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.
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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.
- If the role requires a criminal record check for **Disclosure or Protection of Vulnerable Groups (PVG)** you **MUST** manually add the prescreening questions to the job requisition from the question library. For further information about Disclosure and PVG checks please visit the [HR webpages](#).
- 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 or increase the number of openings on a** job requisition, please raise a service request to HR Operations using the category 'Advertising'.
- Please **do not** close a requisition due to UKVI requirements.
- **Student Jobs** – if you wish to advertise your post on the student careers site you must select the recruiting type as 'Student' when creating the requisition. If you want to advertise the student post both on the student careers site and on the internal careers site you must state this in the job posting comments.

You can 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.

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.

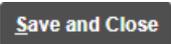
For detailed guidance, see the [next section](#).

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](#).

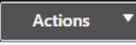
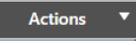
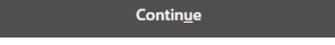
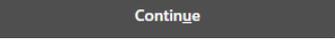
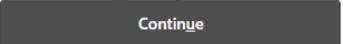
Editing a Draft Job Requisition

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.

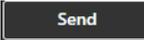
Deleting a Job Requisition (not submitted for approval)

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**.

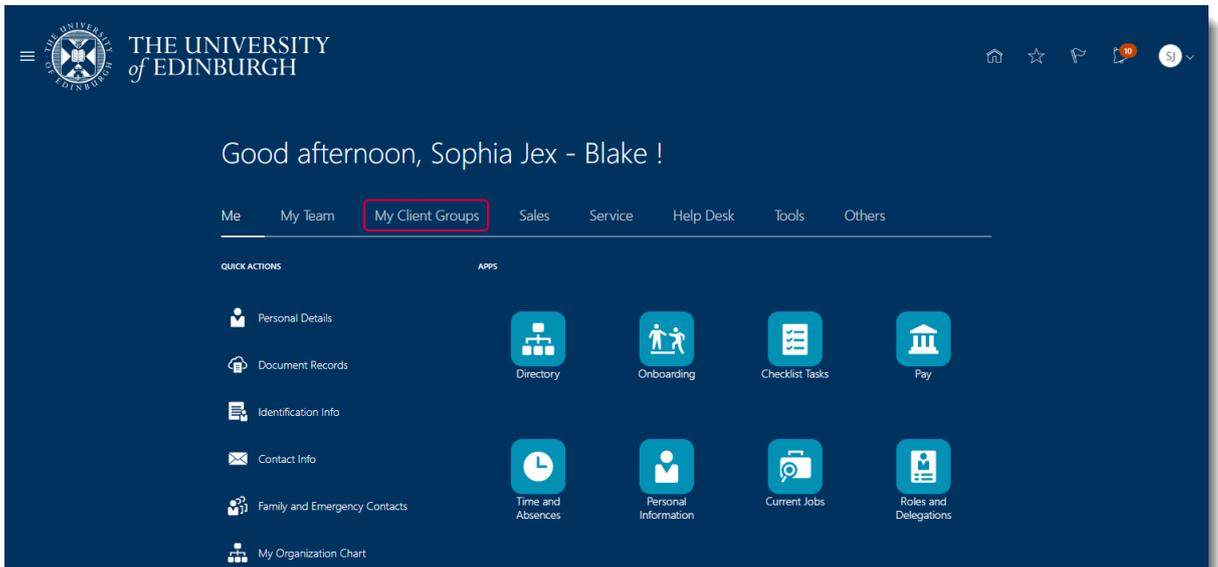
 To make any amendments, select **Edit**  in the message section and repeat step 11.

For detailed guidance, see the [next section](#).

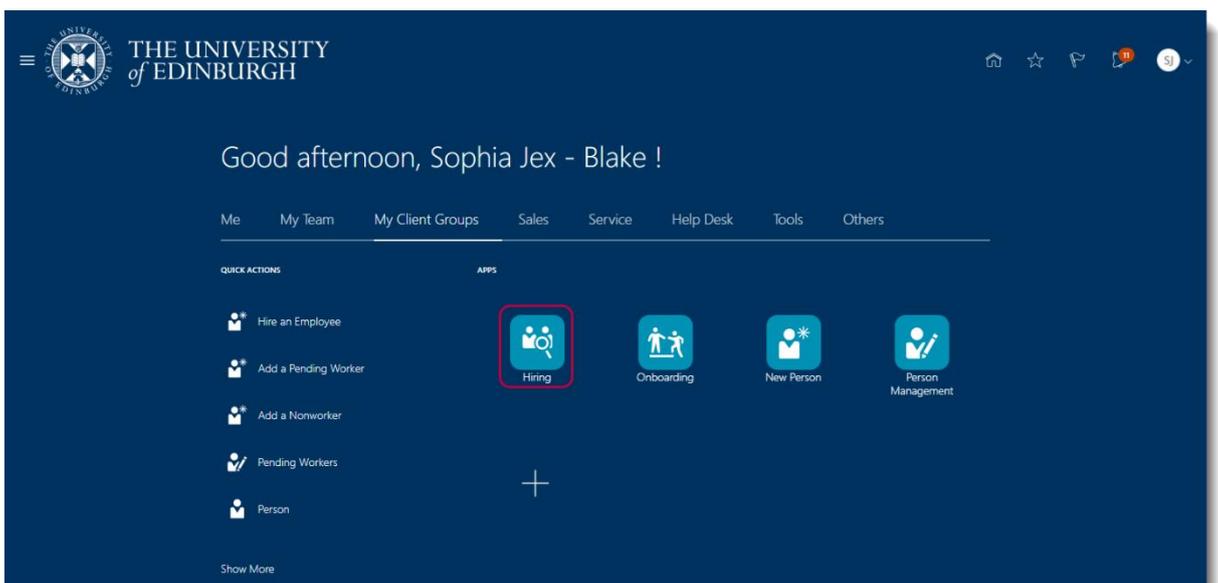
In Detail...

Creating a Job Requisition

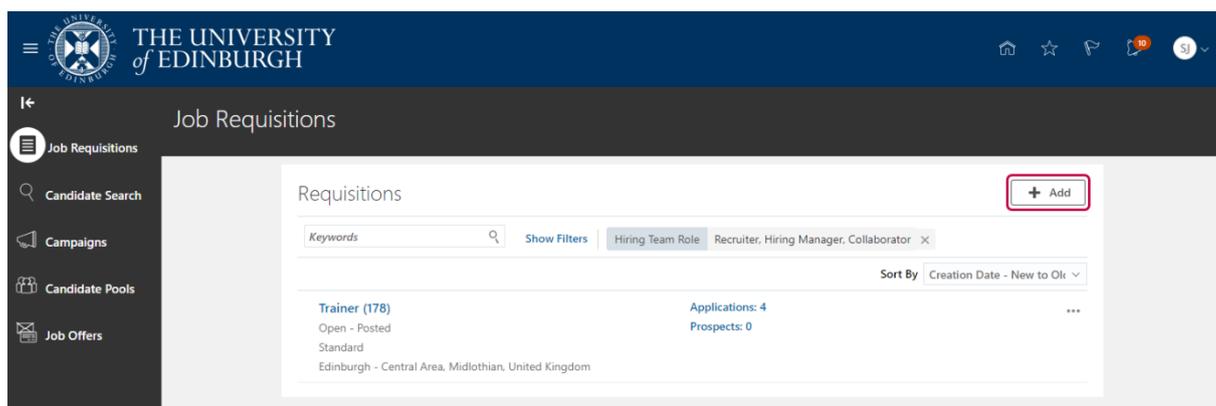
1. From the **Home** page, click on the **My Team/My Client Groups** link.



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.

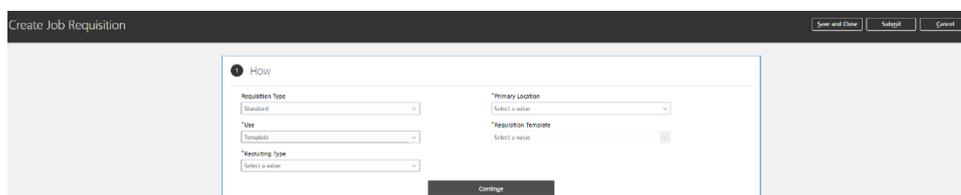


4. The **Create Job Requisitions** page opens in section **1 How**.

In total there are 12 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. **Requisition Type** – select Standard
 - b. **Use** - select the relevant option. To read an explanation of the Use Types, go to [Appendix 1](#).
 - 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.
 - c. The further fields that you see depend upon the option you select under 'Use' above. They each have minor differences but you should select the appropriate **Business Unit, Primary Location and Position and requisition as prompted**.



6. Click **Continue** and go to **section 2 Provide Details**.

7. Complete the following fields in the **Provide Details** section:

- a. The **Recruiting Type** is set to pre-populate from section 1 'How'.
- b. **Primary Location** – enter as appropriate

- c. Enter the **Requisition Title** (this is what will be seen when the job is advertised). If in this field the position title appears you should update this to something more meaningful.
- d. The **Number of Openings** defaults to 1 – please enter the number required
 - 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”
- e. Hiring Manager – will be default to the person creating the requisition
- f. Recruiter – to be entered.

2 Provide Details

*Recruiting Type Standard	*Number of Openings Limited 1
*Primary Location United Kingdom	*Hiring Manager [Redacted]
*Requisition Title Administrator (CI) (PAO - Administration)	*Recruiter [Redacted]

Continue

8. Click **Continue** and go to section **3 Basic Info**

- a. **Requisition Status and Requisition Type** can not be amended
- b. The **Requisition Title** is set by default from the previous screen (Provide Details)
- c. The **Number of Openings** is set by default from the option selected in the Provide Details screen
- d. The **Position** is set by default from the option selected in the **How** section
- e. **Business Justification** - 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”

3 Basic Info

Requisition Status Draft - In Progress	Position Administrator (CI) (PAO - Administration) (01886)
Requisition Type Standard	*Business Justification Internally Funded
*Requisition Title HR Administrator	Languages American English
*Number of Openings Limited 1	

Continue

9. Click **Continue** and section **4 Hiring Team** opens.

10. 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:
 - **Collaborator** – someone who helps review applications (but cannot move candidates between phases and states)
 - **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)
 - **Interview Panel** – someone internal who will be on the interview panel, receiving interview scheduling notifications and interview feedback questionnaires

Collaborator roles are automatically provisioned to anyone Grade 7 and above. If the person you are wishing to add as a collaborator 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 using the category User Access and titled 'Add Collaborator Role' to get the role added for the person. Once allocated they will be available in the list.

The screenshot shows a web form titled "4 Hiring Team". It contains two dropdown menus for "*Hiring Manager" and "*Recruiter", both with redacted names. Below these is an "Add Collaborator Type" dropdown menu, which is open to show a list of options: "Collaborator", "Offer Specialist", and "Interview Panel". A "Continue" button is located to the right of the dropdown menu.

11. Click **Continue** and **section 5 Requisition Structure** opens.
12. 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**' if you want to advertise on the student recruitment website.
 - b. Select the applicable **Organization**, **this MUST be your department as this will impact on the data you can see for your department and will also allow candidates to search for jobs advertised in your department in the careers site**
 - c. Select the **Primary Location** for the role
 - d. If it applies, select the **Other Locations** where the role is required to work

- e. Job Family – defaults from the position
- f. Job function – defaults from the position

5 Requisition Structure

*Recruiting Type Standard	Other Locations Select a value
*Organization Human Resources, Edinburgh University Group	Add Another Location
*Primary Location United Kingdom	*Job Family Professional, Administration and Operational
	*Job Function Administration

Continue

13. Click **Continue** and section **6 Details** opens.

14. Complete the fields in the **Details** section with information relevant to the role, noting the following:

Field Name *indicates mandatory field	Guidance for use
Worker Type	Select Employee
Full or Part Time	Indicates Full or Part time
Maximum 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.
Opt out of sponsoring a successful candidate (even if the post is sponsorable)*	<p>Using the information provided on the Job Requisition Business Case Form (section 4 SOC/ATAS Code Allocation)</p> <ul style="list-style-type: none"> - Select Yes if you are opting out of sponsoring the successful candidate (even if the role is sponsorable). - Select No if you are not opting out and do want to advertise the role and consider applicants requiring sponsorship. <p>Further guidance is available https://www.ed.ac.uk/human-resources/international-staff-work-uk/additional-permission-work/university-sponsorship/skilled-worker (see Guidance 'Allocating a SoC code' under section Header Allocating a SoC Code).</p>

Fixed Term Reason	Select the appropriate Fixed Term Reason. Further details available in the Fixed Term Contracts Reason Codes .
Job Posting requirements*	Specify where the job advert should be posted, eg internal only, external (includes internal), student site only. Tip - the Recruiting Type in Step 5 Requisition Structure must be 'Student' if wanting to post on the student site.
Job Shift	Select appropriate
Education Level	Select appropriate
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
Job Posting Comments (character limit in this field is 800).	Include additional information about the job advert, including: <ul style="list-style-type: none"> • the names of any job boards you wish to advertise on • the duration of the advert start and end date/time for posting (Please note that the default closing time for all adverts is 11:59pm GMT, however the applicant will see the closing time as per the browser time zone they are applying from). • If you are advertising the job externally via Penna you must include the Purchase Order (PO) number here. The PO number must be in the following format UOExxxxxxx (7digits). • If you are advertising the role on S1Jobs (via Penna) you should provide the 'Core Skill' that the advert should be placed under. Please see the list available on the Where to Advertise webpage. This enables the job to be searchable under the correct category on S1Jobs. • If you want to advertise the student post both on the student careers site and on the internal

	careers site you must state this here –Tip the Recruiting Type in Step 5 Requisition Structure must be ‘Student’ to enable this.
Health and Safety Requirements*	Select appropriate – if hazards identified include additional detail in the posting description.
Criminal Record Check*	If the role requires a Disclosure or Protecting Vulnerable Groups (PVG) check please ensure you select the appropriate option from the drop down, this will then appear in the Job Info section of the job advert.
Contract Type*	Select appropriate – for additional guidance see Contracts of Employment – Guidance onTypes of

6 Details

Worker Type
Employee

Full Time or Part Time
Select a value

Maximum Salary

*Opt-out of sponsoring a successful candidate (even if the post is sponsorable)?

Fixed-term Reason

*Job Posting Requirements

Job Shift
Select a value

Education Level
Select a value

Minimum Salary

*Job Posting Comments

*Health and Safety Requirements

*Criminal Record Check

*Contract Type

Continue

15. Click **Continue** to section **7 Work Requirements** opens.

16. 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**

7 Work Requirements

Travel Required

International Travel Required

Willing to Relocate

Work Duration Months

Continue

17. Click **Continue** and section **8 Posting Description opens**. Here 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:

8 Posting Description

Posting Description for Internal Candidates

Enter Custom Internal Posting Description

Short Description for Internal Candidates
 Description for Internal Candidates

Same Posting Description for Internal and External Candidates

Name of Internal Contact

Name of External Contact

Email of Internal Contact

Email of External Contact

Continue

This then displays the following screen

8 Posting Description

Posting Description for Internal Candidates

Enter Custom Internal Posting Description

Short Description for Internal Candidates

Description for Internal Candidates

← → *T* **B** *I* U **¶** **☰** **⌕**

Words: 0 Characters (with HTML): 0

Same Posting Description for Internal and External Candidates

Name of Internal Contact

Name of External Contact

Email of Internal Contact

Email of External Contact

Continue

Note: You can either enter 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.

18. Complete the following fields in the **Posting Description** section to populate the information for the job advertisement:
- 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.
 - 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
 - Update or enter the **Name of Internal Contact** and **Email of Internal Contact** to be displayed on the job advertisement for internal candidates
 - Update or enter the **Name of External Contact** and **Email of External Contact** to be displayed on the job advertisement for external candidates

Accommodation Manager 185 Save and Close Submit Cancel

7 Posting Description

Internal Posting Description

Enter Custom Internal Posting Description

Internal Short Description a

We are looking for an Accommodation Manager to run George Square student accommodation with the highest safety in mind, whilst ensuring a first class residential and customer experience.

Internal Description b

The opportunity
To take the lead role in the management of the residence, ensuring the property is managed and operated in line with our agreed operating principles and supporting the achievement of our company goal to be industry leading in service levels to students, parents and stakeholders.

Your skills and attributes for success

Same Description for Internal and External c

Name of Internal Contact d	Name of External Contact e
Sophia Jex Blake	Sophia Jex Blake
Email of Internal Contact	Email of External Contact
vfdw123@ed.ac.uk	vfdw123@ed.ac.uk

Continue

It is important to note that a Job Description can not 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.](#)

19. Click **Continue** and section 9 Offer Info opens.

20. 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. **In the Workplace field select if the job is on campus (100% on campus working) or hybrid working (a mix of on campus and off campus working). DO NOT select 'N/A Do not use' as this will appear in the advert on the careers site.**
- g. The **Job** field is populated by default from the option in the **Basic Info** section
- h. Select the applicable **Grade** for the role

9 Offer Info

Legal Employer University of Edinburgh	Other Work Locations Select a value
Business Unit University of Edinburgh	Add Another Work Location
Department HR - Talent and Development	*Workplace Hybrid working
Primary Work Location Dalhousie Land	Job Administrator (C1) (PAO - Administration) (00016)
	*Grade UE04

Continue

21. Click **Continue** section 10 **Attachments** opens.

22. Upload a copy of the “Job Requisition Business Case” (JRBC) form:

- 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.
- The file appears in the **Attachments** section.

10 Attachments

Drag files here or click to add attachment

Continue

Click **Continue** and section 11 **Configuration** opens.

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

- 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](#).
- 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.
- 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.
- Automatically Fill Requisition**

- **This will automatically default to Yes.** Once the specified number of job openings is reached the job requisition will change to “filled”.
- If there are 50 or fewer candidates, the job requisition will be filled right away. If there are more than 50 candidates, a message will appear, letting you know that the requisition will be filled soon. During this time, you can still work on the requisition and manage job applications.
- When the target number of candidates are moved to the HR Phase then the requisition will automatically be updated to the filled status. It is important that candidates are moved through the relevant recruitment phases and states to enable accurate requisition status and strategic reporting. Details of the recruitment phases and states can be found in the [Guide to Recruitment and Onboarding](#).
- When creating a job requisition, ensure you accurately specify the number of openings. If the number changes or you want to increase the openings, contact HR Operations through a Service Request using the "Advertising" category. Attach a signed JRBC (Job Requisition Business Case) for the necessary adjustments.
- You can amend the option to “No”. This means the requisition must be manually closed when someone is hired, otherwise it remains open when it has been filled and may impact hiring data, therefore it is recommended that the default “Yes” is used.

The screenshot shows a configuration form with the following fields:

- *Candidate Selection Process**: A dropdown menu with the text "Select a value".
- *External Application Flow**: A dropdown menu with the text "Select a value".
- Allow Candidates to Apply When Not Posted**: A dropdown menu with the text "No".
- Automatically Fill Requisition**: A dropdown menu with the text "No".

At the bottom center of the form is a dark grey button labeled "Continue".

24. Click **Continue** section 12 Questionnaires opens.

There are a number of mandatory prescreening questions set for both **internal** candidates and **external** candidates. The example below shows the Internal Prescreening questionnaire.

12 Questionnaires

Internal Prescreening Questionnaire

Add Question
Select a value

Will this be your only assignment or will you hold another assignment alongside this one with us?
 Question Code: JAQ_ADDITIONAL_ASSIGNMENT
 Question Classification: Prescreening Question Added Automatically
 Question Type: Single Choice
 Requires Response

Are you a current student at the University of Edinburgh?
 Question Code: JAQ_CURRENT_STUDENT
 Question Classification: Prescreening Question Added Automatically
 Question Type: Single Choice
 Requires Response

Please provide your student matriculation number (numbers only)
 Question Code: JAQ_CURRENT_NUMBER
 Question Classification: Prescreening Question Added Automatically
 Question Type: Text
 Requires Response
 Controlled by 30000008482162

When could you start this role?
 Question Code: JAQ_START_DATE
 Question Type:
 Requires Response

25. To add an extra prescreening questions 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.

Internal Prescreening Questionnaire

Add Question
Select a value

Question Text	Question Code	Folder
Disclosure check required - We recognise the contribution that ex-offenders can make as employees and welcome applications from them. A person's criminal record will not, in itself, debar them from being appointed to this post. Suitable applicants will not be refused posts because of offences which are not relevant to, and do not place them at or make them a risk in, the role for which they are applying. All cases will be examined on an individual basis. Do you have any criminal convictions or outstanding charges that are not spent?	CRIM_APP_001	Job Application Questions
PVG check required - We recognise the contribution that ex-offenders can make as employees and welcome applications from them. A person's criminal record will not, in itself, debar them from being appointed to this post. Suitable applicants will not be refused posts because of offences which are not relevant to, and do not place them at or make them a risk in, the role for which they are applying. All cases will be examined on an individual basis. Do you have any convictions whether spent or not and also any police cautions?	PVG_APP_001	Job Application Questions

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

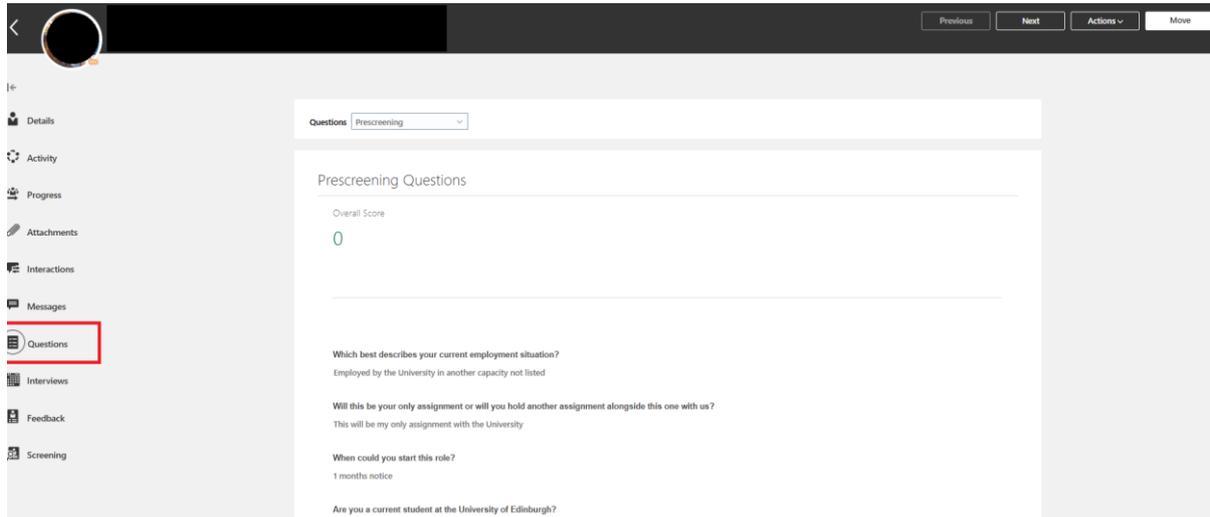
PVG check required - We recognise the contribution that ex-offenders can make as employees and welcome applications from them. A person's criminal record will not, in itself, debar them from being appointed to this post. Suitable applicants will not be refused posts because of offences which are not relevant to, and do not place them at or make them a risk in, the role for which they are applying. All cases will be examined on an individual basis. Do you have any convictions whether spent or not and also any police cautions?

Question Code: PVG_APP_001
 Question Classification: Prescreening Question Added by User
 Question Type: Single Choice
 Requires Response

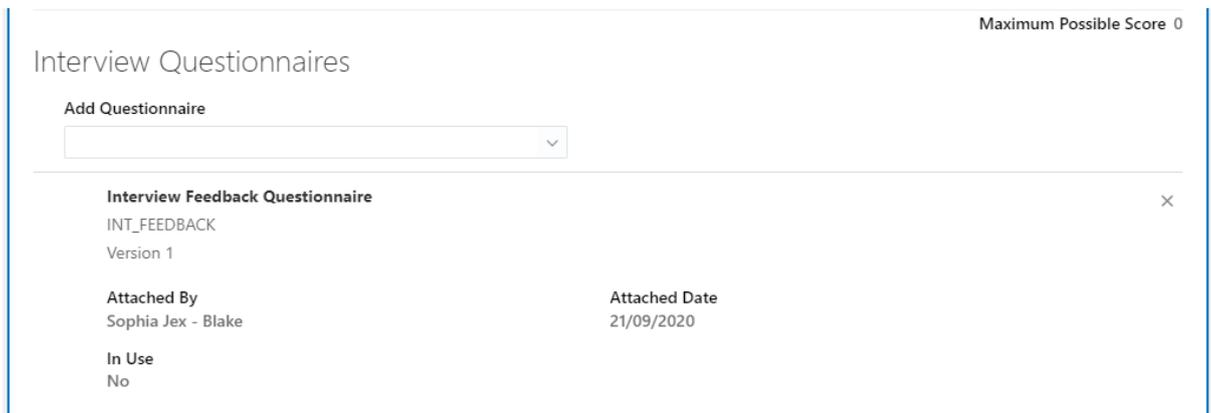
Tips

- If you are advertising the post internally and externally you will need to manually add the additional prescreening questions to both the Internal Prescreening Questionnaire and External Prescreening Questionnaire as appropriate.
- **If the role requires a Disclosure Scotland or Protection of Vulnerable Groups (PVG) check, you MUST manually add the questions relating to this at this stage (they are first on the list).**

- Only the responses to the mandatory prescreening questions will appear on the Shortlisting Matrix. The responses to manually added prescreening questions can be reviewed from the application, Questions section.



27. 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**.

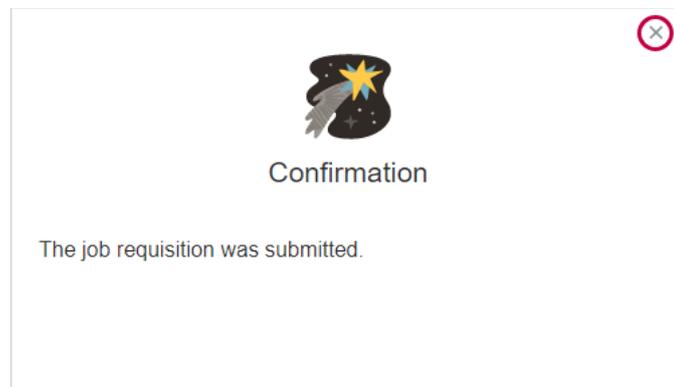


28. The final step, after you have reviewed the requisition details, is to submit it for approval. Authorisation is required before it can be posted onto the internal and/or external job boards. Jump to [Submitting a Requisition](#) for details.

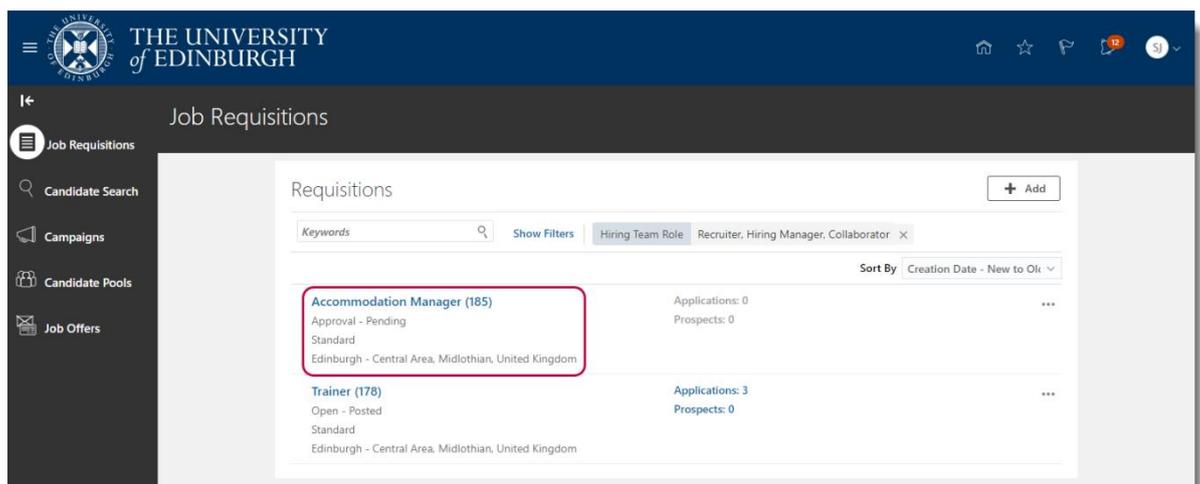
Submitting a Job Requisition

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 **X** 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.

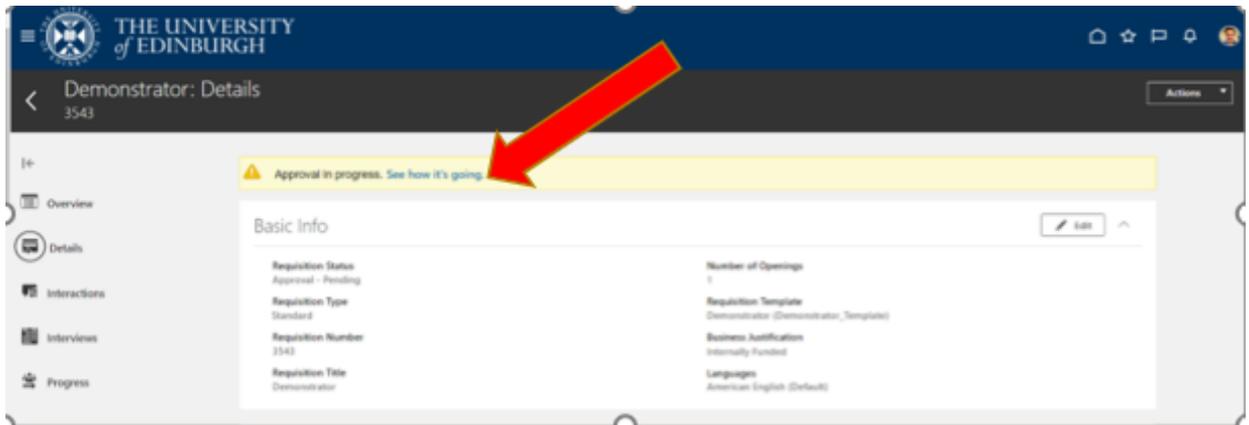


3. When it has been authorised by the business approvers, the system automatically updates the status in the **Job Requisitions** page to **Job Formatting – In Progress**.

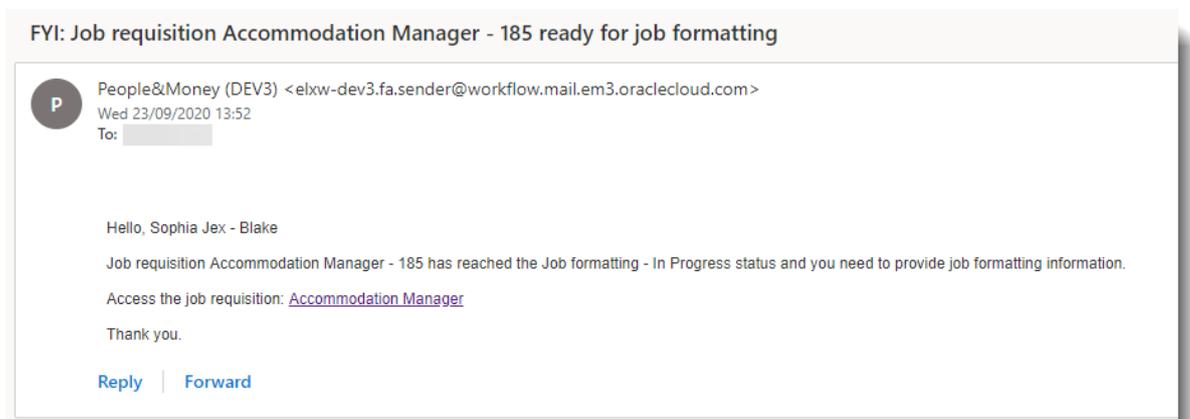
It is possible to track how job requisitions are moving through the approval process by viewing banners displayed on the Overview and Details tabs of job requisitions. Job requisition initiators and approvers can also click links on these banners to get more details such as viewing the whole requisition 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.

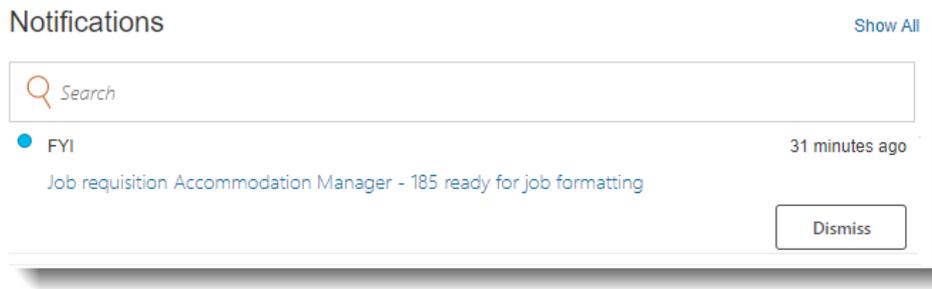


Simultaneously, an automatic email notification is generated to let the **Hiring Manager** and **Recruiter** know that the requisition has been approved.

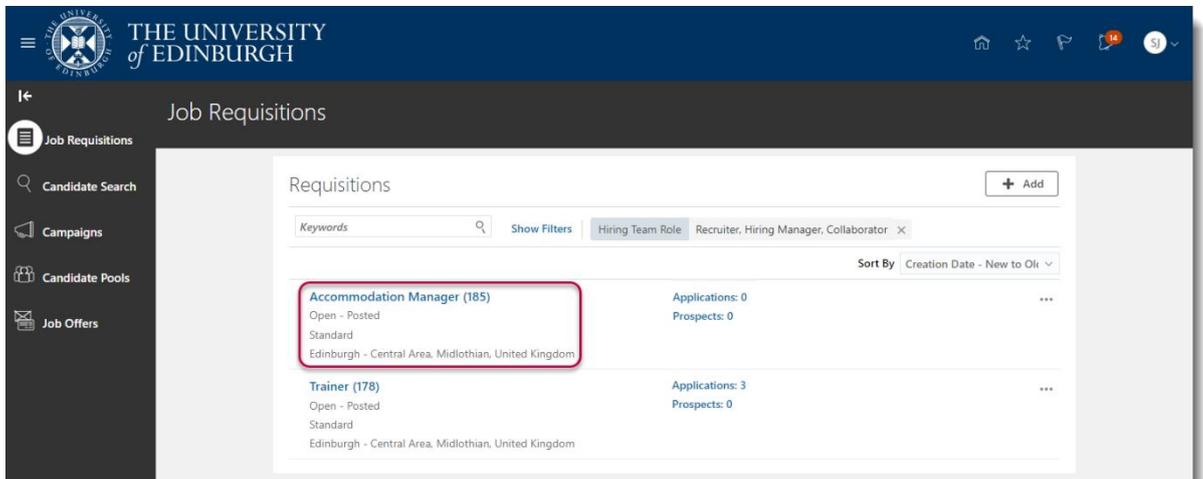


When you click the **Bell** notification icon located at the top right in the **Home** page, a notification advises a “Job requisition... ready for job formatting.”

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) <elxw-dev3.fa.sender@workflow.mail.em3.oraclecloud.com>

Wed 09/09/2020 20:51

To: WILSON Dor <v1dwil23@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](#)

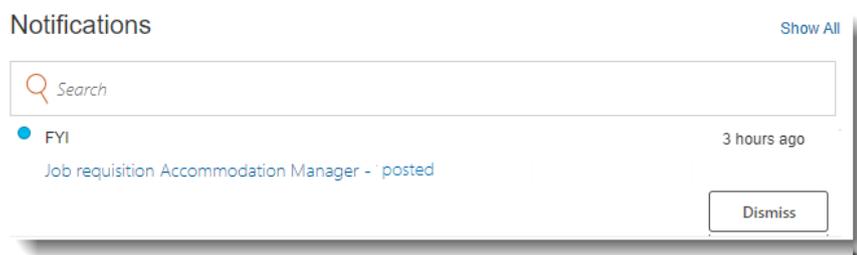
[View the external job posting](#)

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.



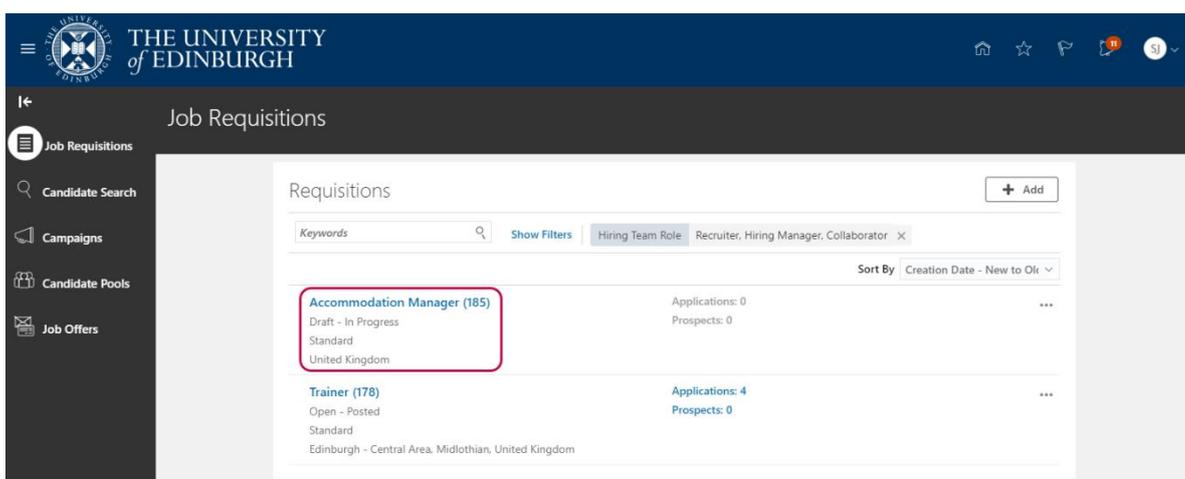
Saving a Draft Job Requisition

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

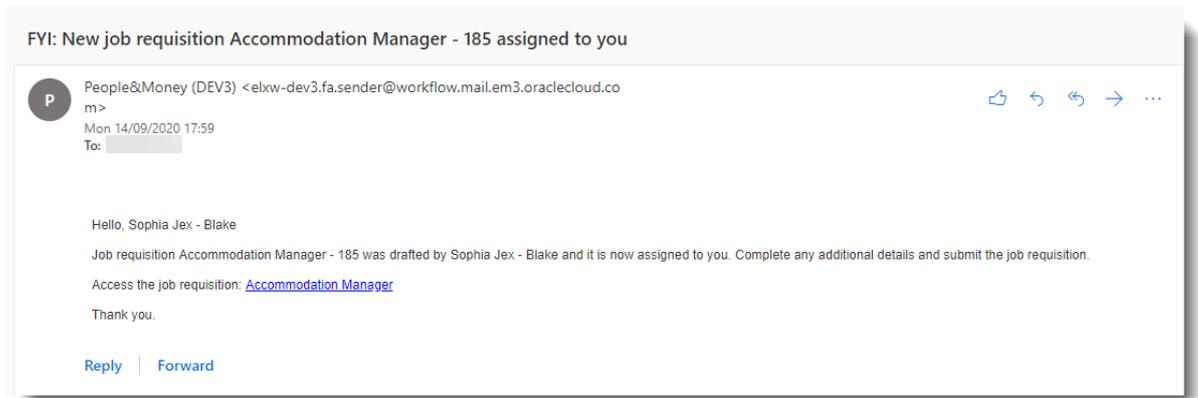
1. In the requisition complete the section that you are editing, ensuring that there is no data missing from mandatory fields.
2. Click **Save and Close** in the black banner.



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

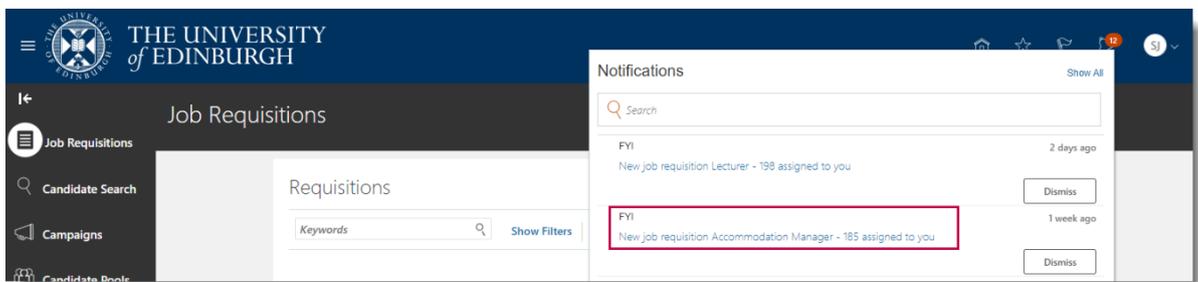


Simultaneously, the first time a draft requisition is saved, the system generates an automatic email notification to let the **Hiring Manager** and **Recruiter** know. Subsequent saves do not generate a notification message.



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.



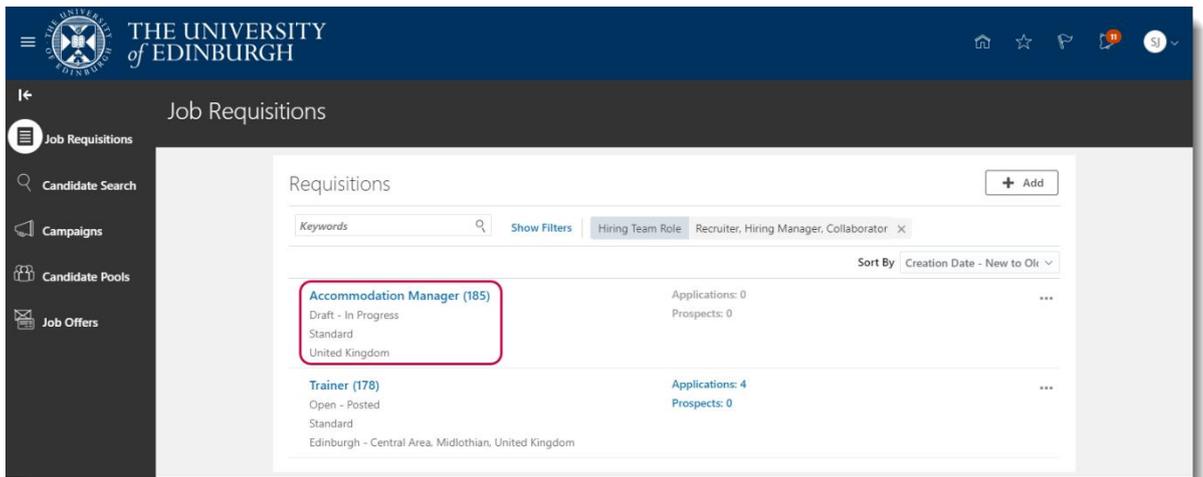
Editing a Draft Job Requisition

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**.

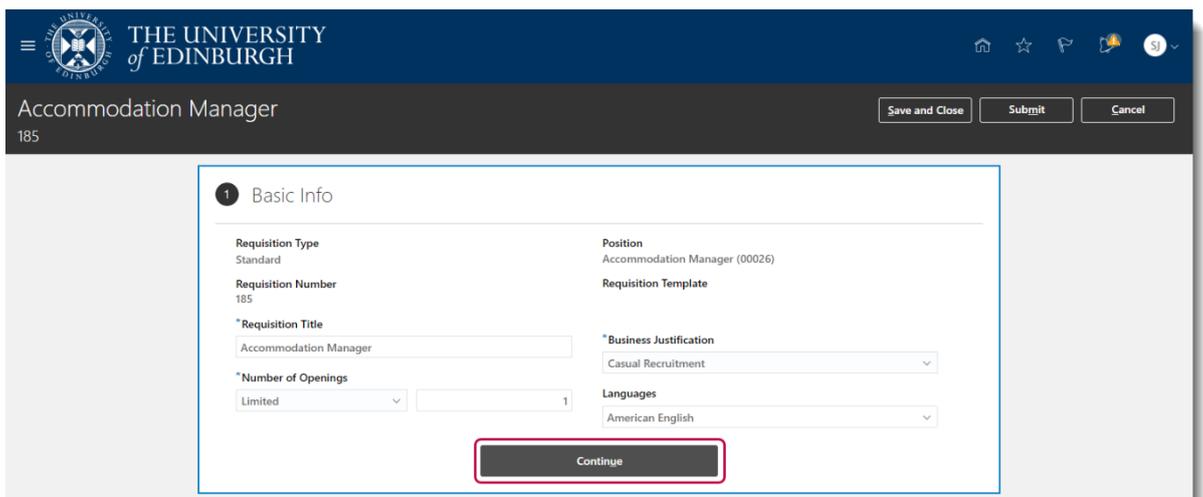
or

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**.

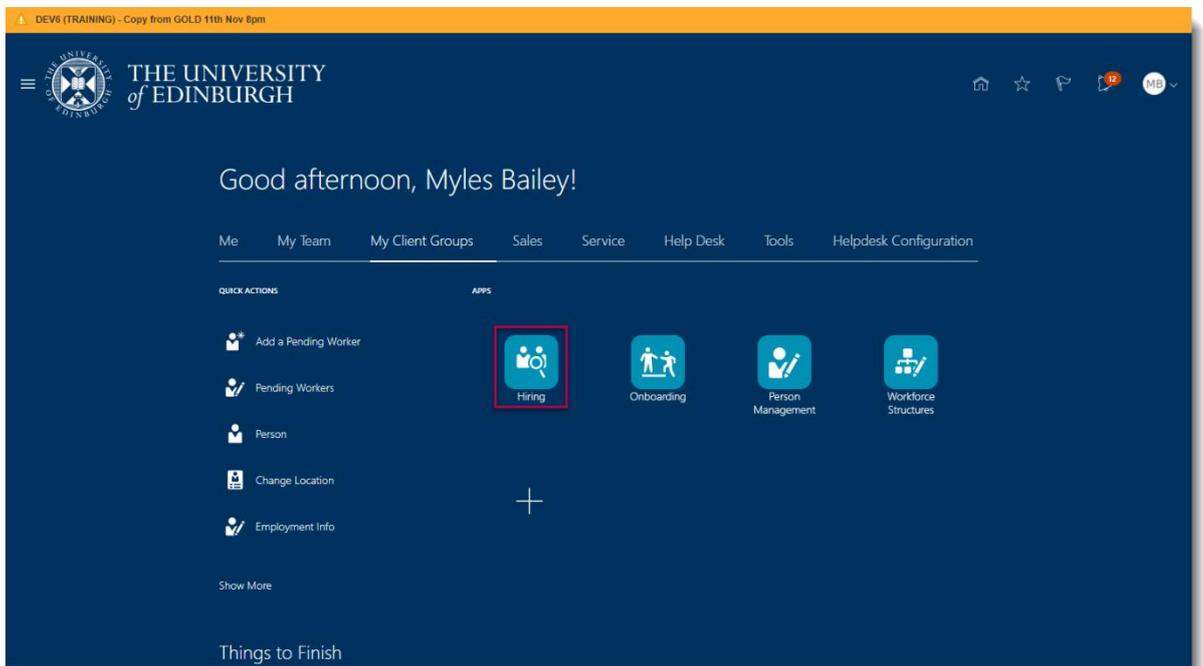
Note: The sections are renumbered as the original **1 How** is no longer available. You cannot change the requisition type and will need to create a new one if this is the case.



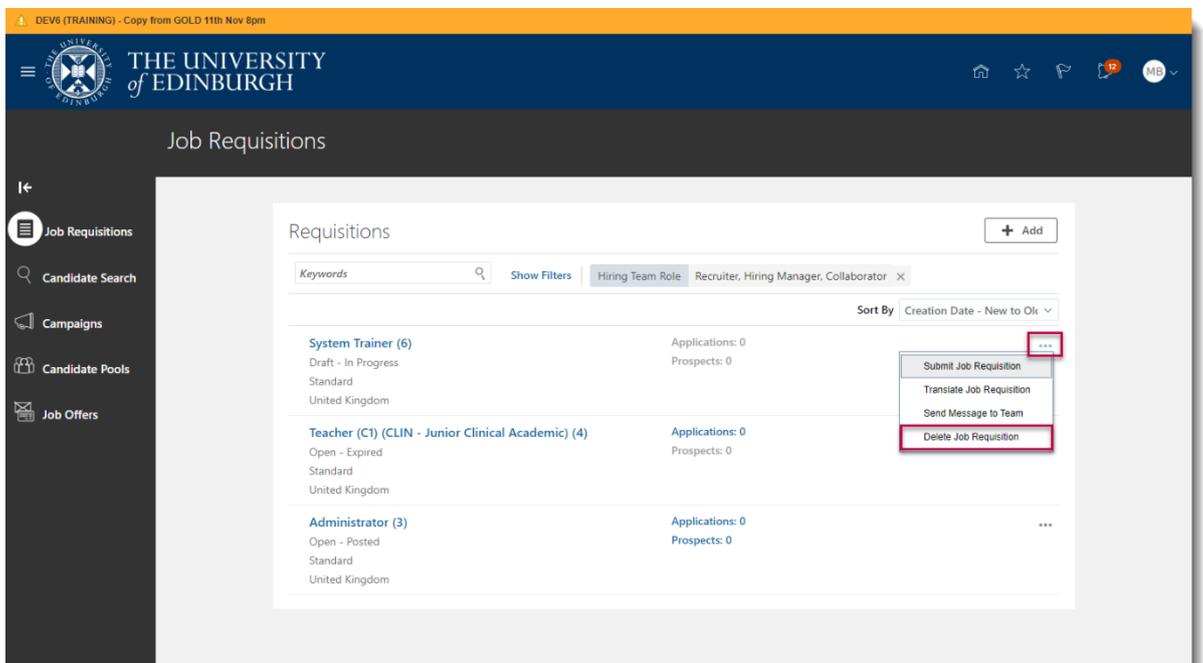
3. Click on the **Continue** button until you navigate to section that you want to edit or to continue working from.
4. To carry on creating the requisition, refer to the appropriate steps in [Creating a Job Requisition](#).

Deleting a Job Requisition

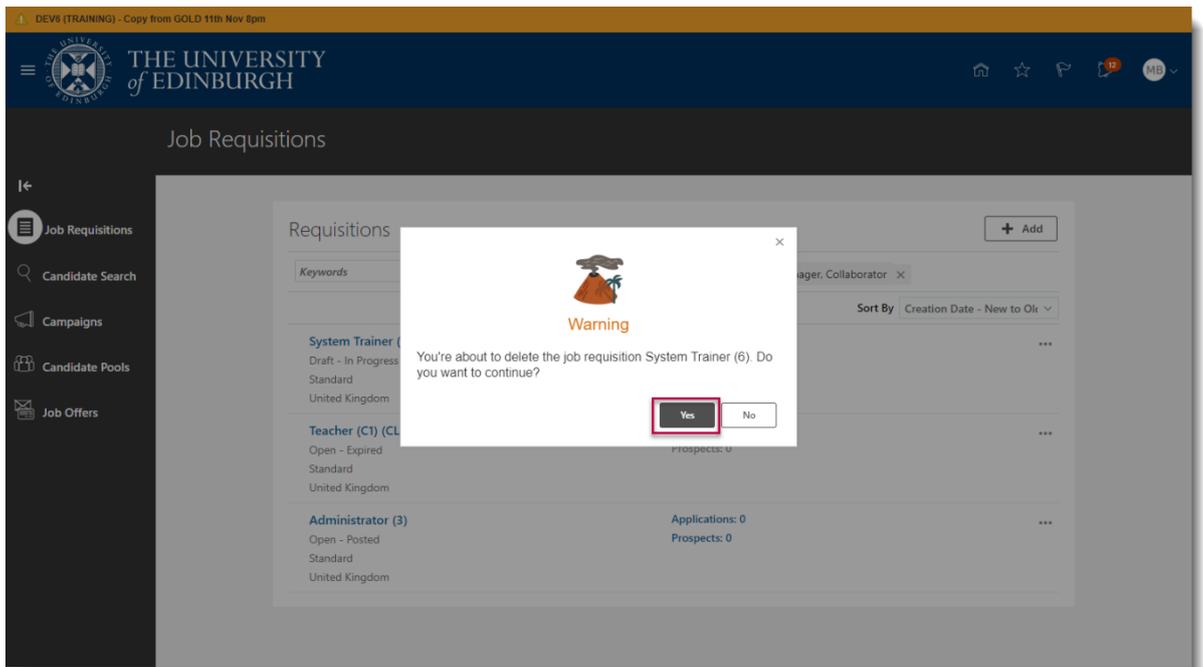
1. To delete a saved job requisition which has not been submitted for approval navigate to **My Client Groups** then select **Hiring**



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

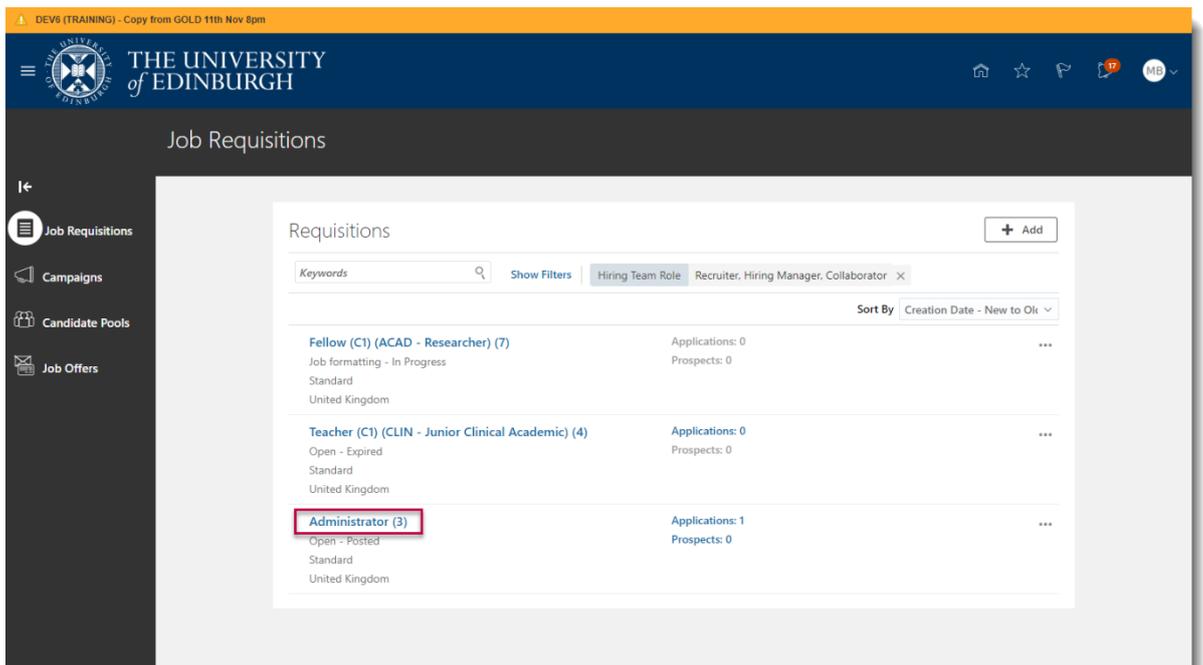


3. Click **Yes** to confirm

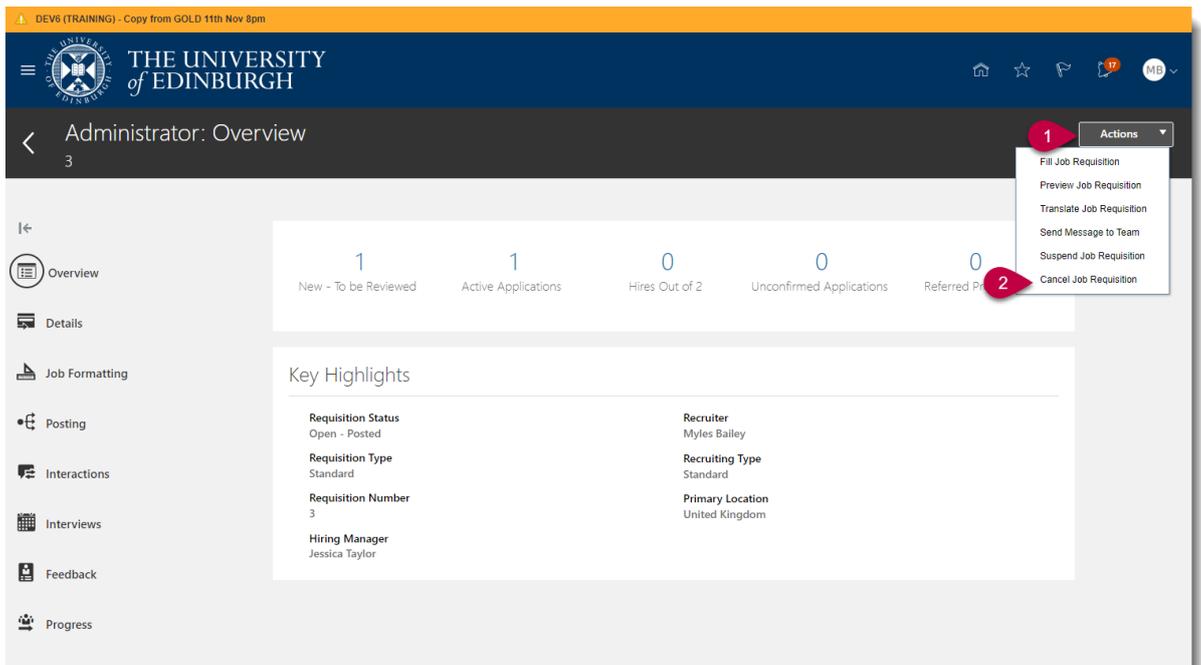


Canceling a Posted Job Requisition

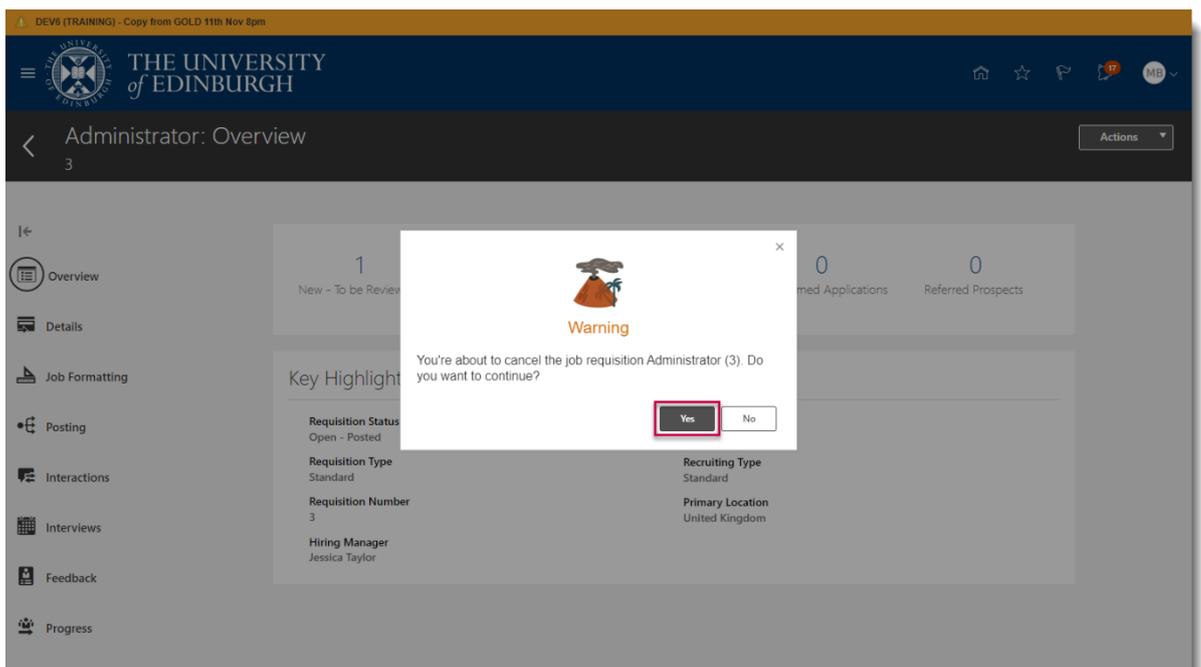
1. To cancel a job requisition navigate to **Hiring** and select the **job requisition**.



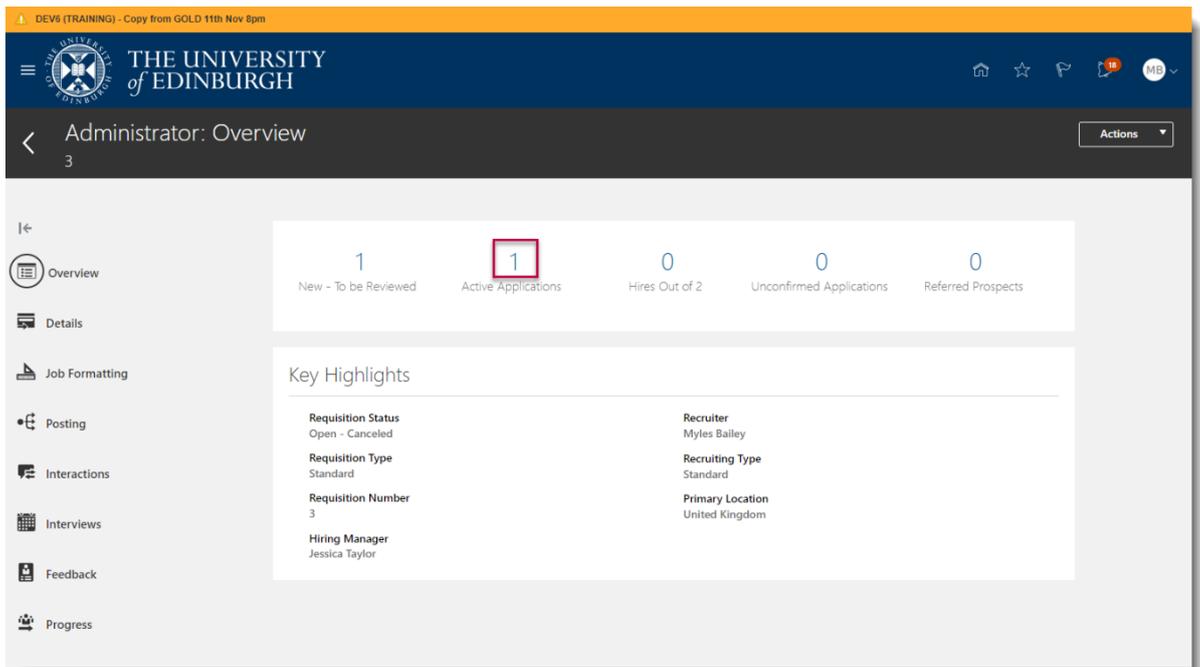
2. Click **Action**, then select **Cancel Job Requisition**.



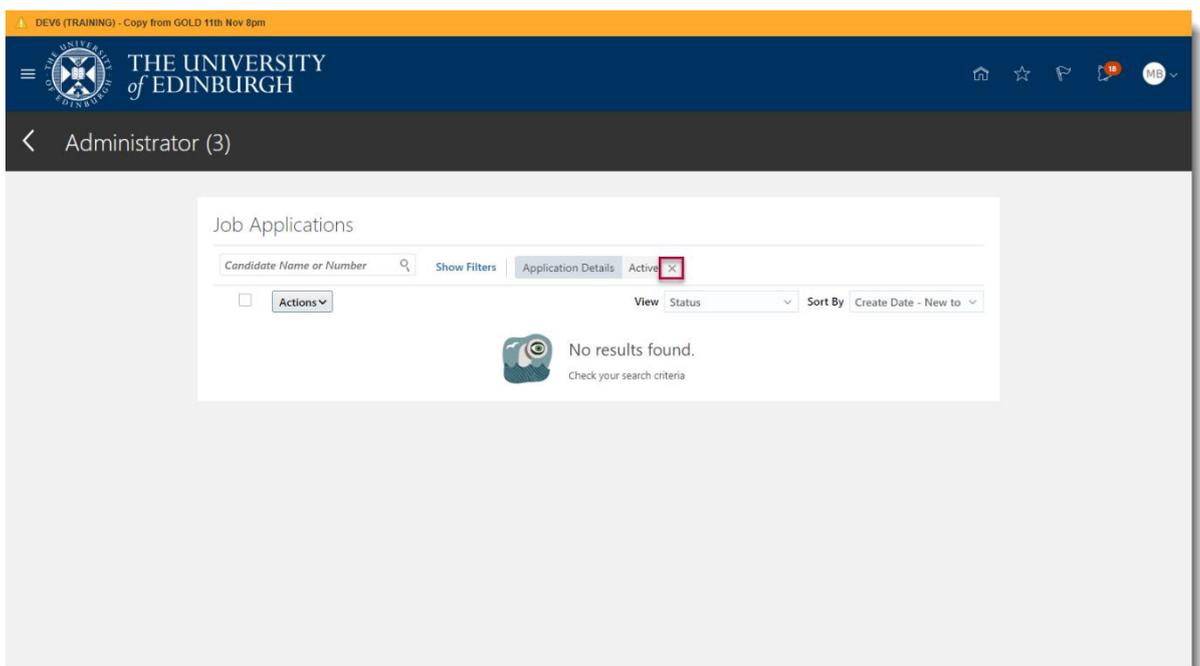
3. Click **Yes** to confirm



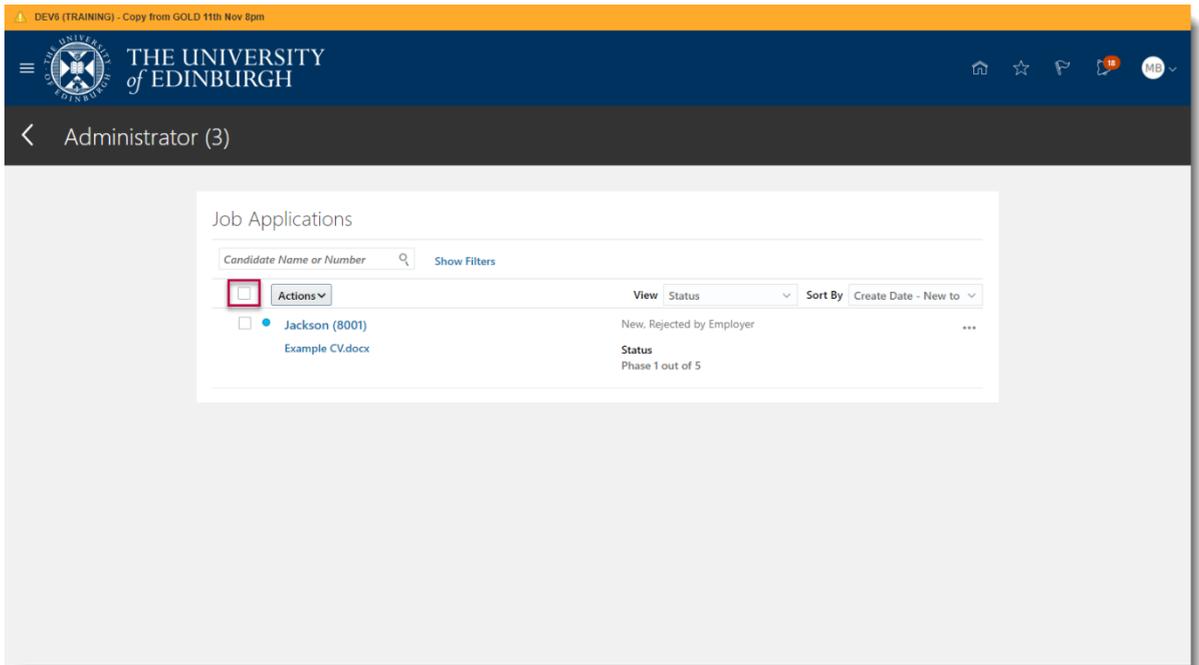
4. If there have been applications to the requisition, continue to step 5 below



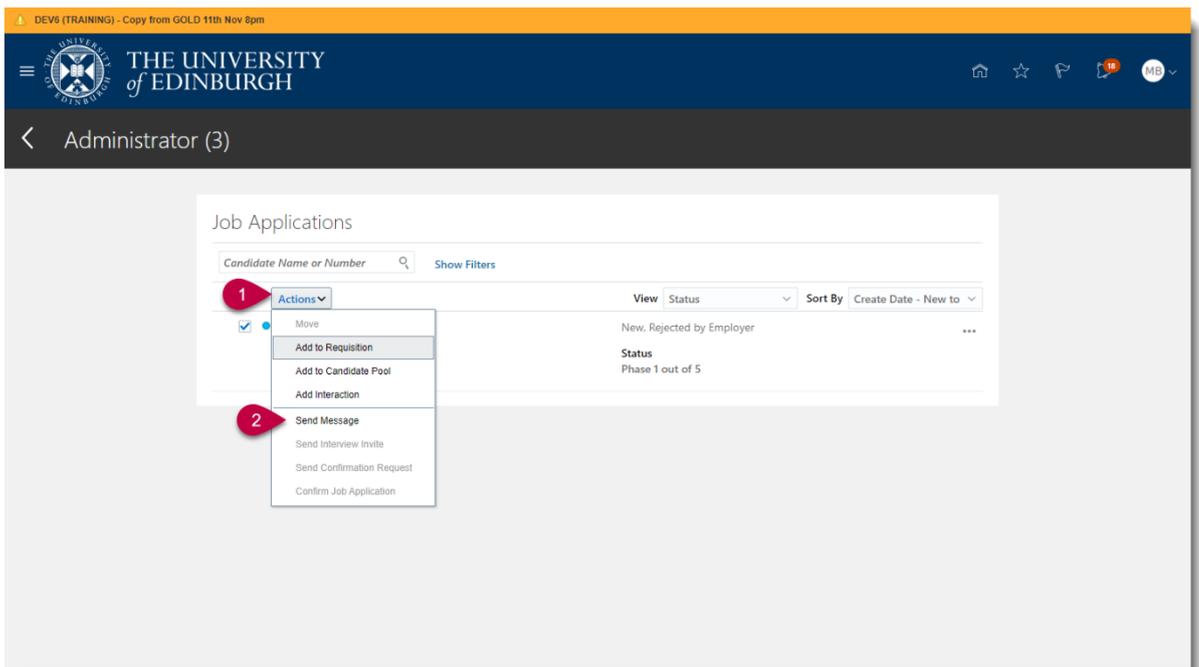
5. Select the applications link
6. Remove the filter showing only active applications



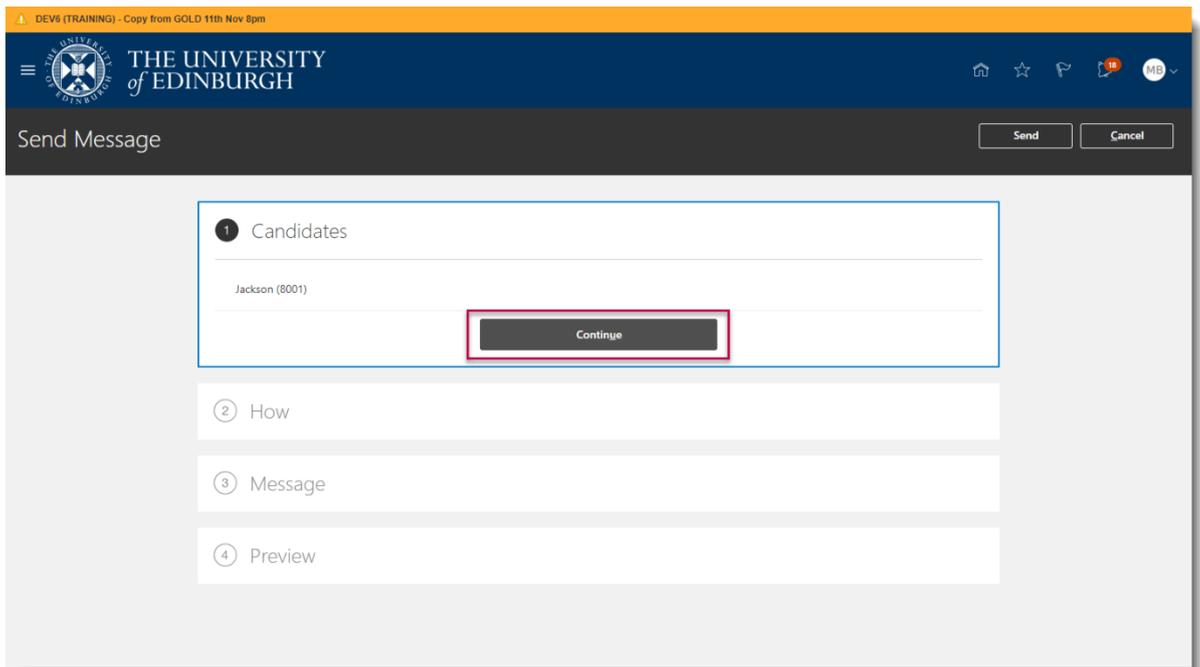
7. Click the checkbox to select all applicants



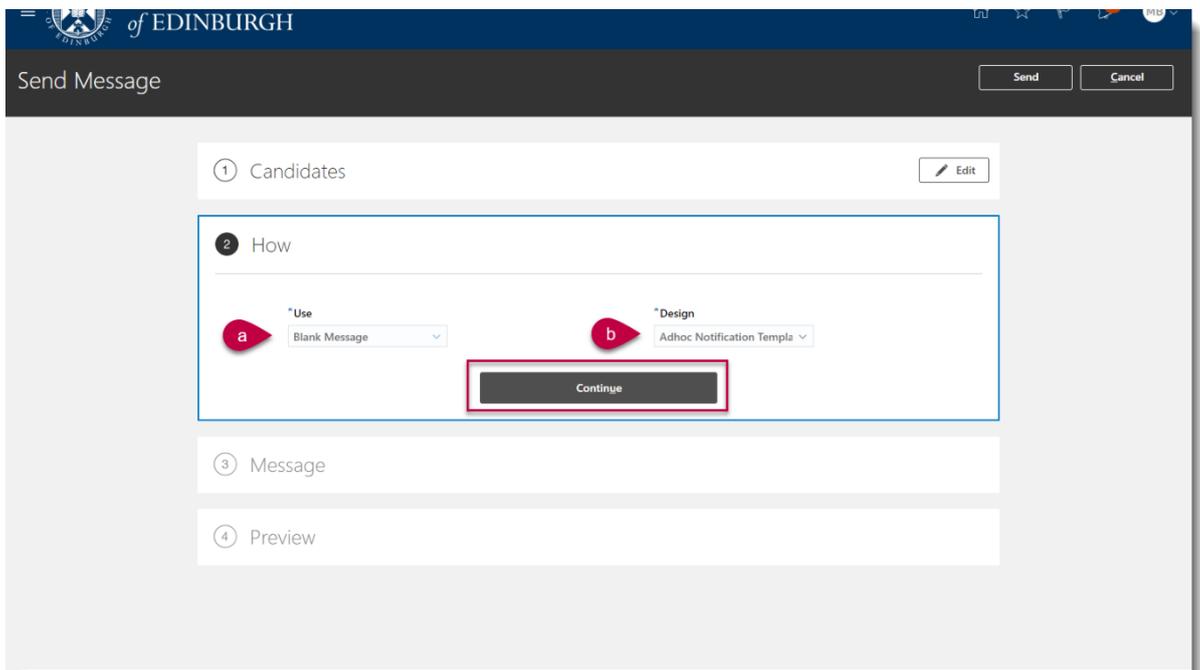
8. Select **Actions**, then **Send Message**



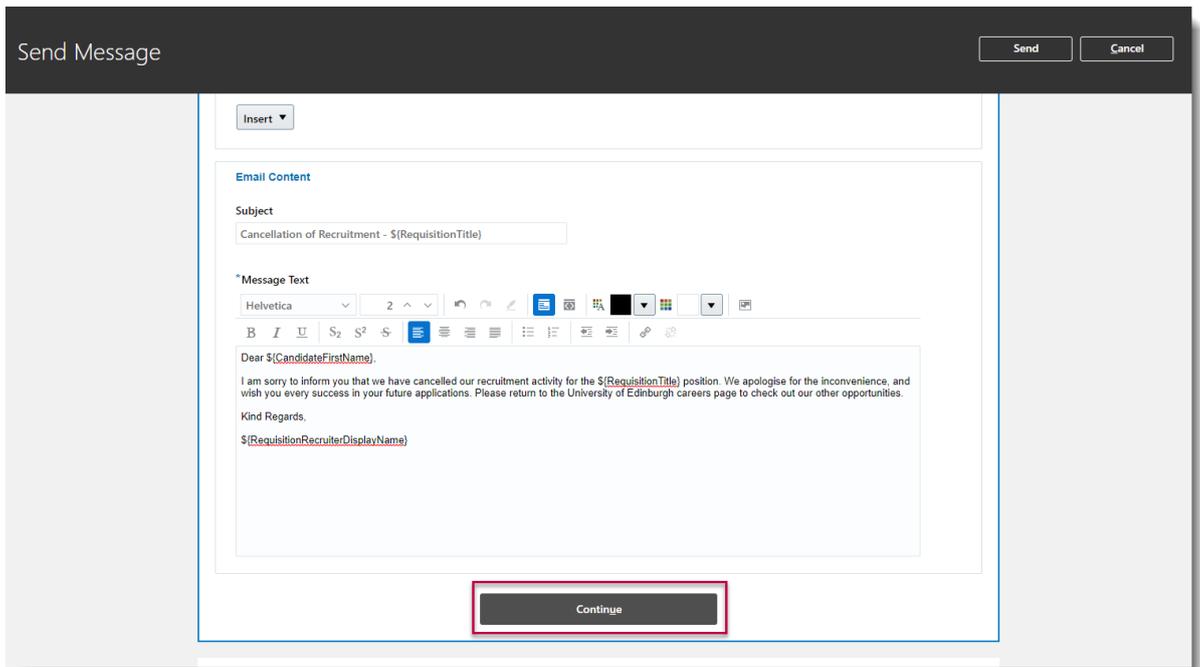
9. Click **Continue** in Candidates section



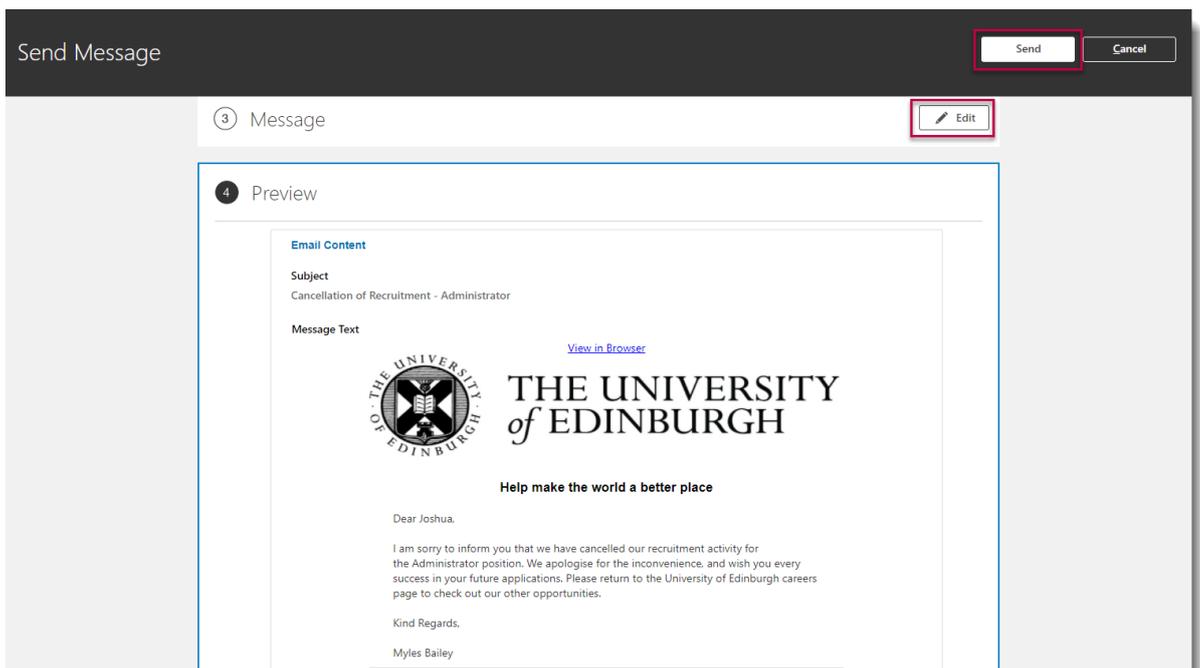
10. There is no template for rejection due to cancellation at advertising stage, therefore select the following settings and click **Continue**
 - a. **Blank Message**
 - b. **Adhoc Notification Template**



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.



Appendix 1 – Job Requisition Use Types

Use	Description
Template	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.
Position	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 the user guide How to request a new position or position change for more information on requesting a new position.
Job	When Job is selected, minimal information is pre-populated in the job requisition and the user must ensure they know the department details. It is preferable to use Position as it contains more content.
Existing Requisition	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.
Blank Requisition	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.

Appendix 2 – Candidate Selection Process

Process	Process Description
Standard_Candidate Selection Process _002- Standart_CSP_002	This option is for standard job requisitions where an offer letter is extended to the candidate.
Bypass Extend Offer_002 - Bypass_Offer_CSP_002	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.

Appendix 3 – Business Justification Reason

Business Justification	Posts
Externally Funded	<p>Those that have no implications for internal funding</p> <p>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</p>
Chair recruitment	<p>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.</p>
Internally funded	<ul style="list-style-type: none"> *New post (> 6 months) *All Clinical posts * All envelope submissions (New and Increases) inclds GH <p>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.</p> <ul style="list-style-type: none"> *Restructure/Reorganisation (New Roles) *All Replacement posts *Secondments *All Temporary absence cover *UE10 posts
Internally funded: minimal financial impact	<ul style="list-style-type: none"> * Student experience envelope * New post (< 6 months)
Casual recruitment	
Subsidiary Recruitment	<p>Edinburgh University Press Ltd UoE Accommodation Ltd Edinburgh Innovations Ltd</p>
Pipeline Requisition	<p>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.</p>