Guide to Job Classifications and Position Management

Contents

Introduction

This guidance provides information on the job classification structure within People and Money. These classifications replace the job segments in the legacy Oracle system. It also outlines the job naming conventions used in the system.

Why are Job Classifications important?

Our job classification structures are a foundational part of our system design. Some key uses of our classifications are noted below

- Reporting
  - A key use of all elements of our job classification model is to facilitate grouping of staff for the purposes of operational, management and statutory reporting.
  - Consideration of how classification approaches support key external reporting requirements, including the HESA staff return and REF, has been key to the development of this design and we believe our approach will support those requirements.
- Security and Permissions
  - Job is the key attribute that drives role based security and permissions (what data the user can see and what actions they can complete) for both HR and Finance processes.
  - The use of Jobs and Job Levels to support the Delegated Authority Schedule (DAS) is key to the development of our design and financial control environment.
- Recruitment – Job portal
  - Job Family and Job Function can be used by potential candidates to filter advertised vacancies on our job pages.
- Learning, Skills and Qualifications
  - Job Family, Job Function and Job can be used to support approaches to learning, skills and qualifications.

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Key Objects relating to Job Classifications

The table below shows some key objects used in the system that relate to job classification. This guidance focuses on Job Family, Job Function and Job but a general understanding of these other objects, their purpose and how they relate to each other provides useful context.

Class	Definition	Global or Unit Specific	Examples
Job Family	A high level logical grouping of related jobs – c. 5 categories.	Global – across business units.	Academic, Clinical, Technical.
Job Function	A more specific logical grouping of related c.35 categories.	Global – across business units.	Finance, Hospitality.
Job	A generic role with an organisation.	Global – across business units.	Lecturer, Senior Lecturer.
Job Level	Identifies how much University Resource someone can approve in line with the Delegated Authority Schedule (DAS).	Global – across business units.	Job Level 0 to 8. All employees without financial authority - job level 0, Heads of School- job level 6, Heads of College/PSG - job level 7. Principal and Provost - job level 8.
Position	An instance of a job A seat/slot in the org structure. May be filled by one or more people, all incumbents must have the same grade band and sit within the same department.	Specific to an individual business unit.	Chair of Economics

Assignment	The Assignment of the person to a specific position.	Specific to an individual business unit.	Prof J. Smith to Chair of Economics.
Person	The person / employee record.	Specific to an individual business unit.	Prof J. Smith.

In People and Money, some attributes can be inherited from higher levels of the job classification model and from organisational units. This approach optimises the inheritance of information from job, position, organisation etc. and limiting unique information that is specific to the individual employee such as Personal Job Title.

There is a distinct need for personal job titles which will be retained in People and Money, mainly to reflect the detail, complexity and even order of role in the University. This is of importance for academic staff that need to present their job publicly for research purposes. Personal job titles will be solely for presentation purposes and will not be used for reporting selection or analysis.

In order to improve consistency within People and Money certain roles use a consistent job title. These include Director of Professional Services and Deputy Director of Professional Services. This does not impact on the use of personal job titles.

Job Family
The job family structure is as follows:

Family	Definition	Short Code
Academic	All academic roles that are not associated to clinical and veterinary clinical activity.	ACAD
Clinical	All academic roles that are associated with clinical activity.	CLIN
Veterinary Clinical	All academic roles that are associated with accredited veterinary clinical activity.	VET
Professional, Administration and Operational	Roles in this family are engaged in the provision of professional, administrative or operational support services to the University, excluding Technical Services.	PAO

Technical	Roles in this family provide technical, specialist and / or scientific support for the University. In particular staff associated with laboratory, workshop and scientific services.	TECH

Job Function

The job function structure is as follows:

Function	Example Roles	Definition
Clinical Academic Consultant	Senior Clinical Research Fellow, Intermediate Clinical Fellow	Academic members of staff with clinical commitments, typically a practicing consultant within a hospital environment.
Academic GP	Chair of General Practice	Academic members of staff based in a GP practice or teaches General Practice on campus at the University.
Clinical GP	Clinical Trials, GP	Academic members of staff with a research focused clinical commitment.
Doctor in Training	Clinical Lecturer	Postdoctoral early career academic staff involved mainly in taught clinical teaching in the University.

Junior Clinical Academic	Online Clinical Tutor, Anatomy Teaching Fellow	Postdoctoral early career academic staff involved mainly involved in clinical research in the University.
Lectureships	Lecturer, Senior Lecturer, Reader, Chancellors Fellow and Reader	Qualified academic members of staff that undertake delivery of programmes and courses, along with providing personal tutors and support for students.
Professorial	Professor Personal Chair (teaching), Vet Clinical Professor Established Chair	Academic members of staff that have been awarded an academic chair.
Researcher	Research Assistant, Early Stage Researcher, Post-Doctoral Research Fellow	Academic members of staff that are predominantly conducting research at the University.
Teacher	Teacher, Teaching Fellow, Senior Teaching Fellow	Members of staff that support the delivery of teaching running tutorials, seminars and practicals.
Tutors and Demonstrators	Tutor, Associate Tutor, Teaching Assistant, Demonstrator	Members of staff that support the delivery of teaching running tutorials, seminars and practicals.
Applied Researcher	People in technical / scientific roles that are providing academic intellectual input	Members of staff that conduct technical or scientific activity at the University and provide academic intellectual input.
Academic Support	Learning Advisor, UG/PG Administrative Officer	Members of staff that are supporting the delivery of the curriculum and research at the University but not conducting teaching or research.
Administration	PA, Administrator, Team Leader, DoPS, Staffing Assistant, HR Administrator, Finance Administrator	Members of staff delivering, supervising or managing the general administration activities that support the operations of the University.

Agricultural Worker	Groundkeeper, Dairy Herdsman	Member of staff working in agricultural and related trades occupations in relation to crops, animal breeding and rearing, or forestry related roles.
Animal Care	Animal Care Assistant, Poultry Technician	Member of staff providing assistance to veterinarians, carry out pest control services, care for animals in stables, kennels, zoos and other such establishments.
Audit	Internal Auditors	Member of staff that are engaged in conducting audits of the University's operations and providing advice on compliance and improvement in University procedures and practices.
Careers Advisory Service	Careers Advisor	Member of staff that give advice on careers or occupations, training courses and related matters.
Chaplaincy	Chaplain	Members of staff that provide information, advice and support to protect the welfare of vulnerable groups and provide spiritual motivation and guidance.
Development	Fundraising Officer, Donor Relations Manager, Philanthropy Officer	Members of staff that support the philanthropic fund raising at the University.
Estates and Facilities	Accommodation Manager, Head of Operations, Joiner, Plumber	Members of staff responsible for the management, running, maintenance and operation of the University's property.

Finance	Management Accountant, Finance Manager	Members of staff that assist accounting and financial processes, managing the University's financial activity and accounts.
Health and Safety	Health and Safety Manager, Portable Appliance Tester	Members of staff responsible for ensuring and promoting health and safety in the workplace and co-ordinate accident prevention and health and safety measures within the University.
Health Care Professional	Counsellors, Pharmacist	Members of staff that are health care professionals providing diagnosis, treatment or support to staff and students at the University.
Hospitality	Chef, Conference and Banqueting Assistant, Catering Manager	Members of staff conducting or supervising catering, hospitality and event management activity at University bars, shops, theatres and similar premises.
Human Resources	HR Advisor, HR Partner	Members of staff that provide advice on recruitment, training, staff appraisal and industrial relations policies and assist specialist managers with negotiations on behalf of the University.

IT	Database Administrator, Developer, Computing Officer, IT Managers, IT Project Managers, IT Programme Managers, IT Business Analysts, IT Architects, IT System Designers, Programmers, Software Development, Web Design and Development, Learning Technology Development & Delivery, AV/IT technical support and delivery, IT Operations Technicians, IT User Support and User Services, Tester	Members of staff that deliver or are managing & supervising the delivery of Information technology and telecommunications services that ensure effective utilisation of information technology and software at the University, including day-to-day running of IT systems, networks and services and provide technical support, advice and guidance for both staff and student users.
Knowledge Transfer	KTP Associate	Members of staff specifically involved in Knowledge Transfer Programmes at the University.
Laboratory Services	Lab Technology Assistant, Mass Spectrometry Laboratory Manager	Members of staff that manage and run laboratories and experimentation facilities within the University.
Legal	Solicitor	Members of staff who are Legal professionals who provide advice and act on behalf of the University in legal matters; preside over judicial proceedings; and perform related professional legal duties.

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Library and information management	Library Assistant, Bookbinder, Curator, Digitisation Assistant, Research Data Support	Members of staff that are librarians and related professionals who appraise, obtain, organise, develop, preserve and make available, both digitally and physically collections of written and recorded material, art objects, pictures, artefacts and other items of general and specialised interest.
Marketing and Communications	Public Relations, Communication Officer, Digital Marketing	Members of staff involved in the public relations, promotion and marketing of the University's goals, impact and brand.
Nursing	Practice Staff Nurse, Treatment Room Nurse	Qualified members of staff that provide general and/or specialised nursing care for the sick, injured and others in need of such care, assist medical doctors with their tasks and work with other healthcare professionals and within teams of healthcare workers. They advise on and teach nursing practices.
Printing	Digital Print Operator, Guillotine Operator and Finisher	Members of staff involved in the production of professional printed and digital media at the University.
Project Management	Project Manager, Business Analyst, Change Manager	Members of staff conducting or supervising staff that provide a change function at the University, including the full lifecycle of projects and programmes to implement people and process change at the University.

Sports and Exercise	Basketball Coach, Head of Rowing, Gym Supervisor, Instructor	Members of staff train amateur and professional sportsmen and women to enhance performance, promote participation and standards in sport, organise and officiate at sporting events, and provide instruction, training and supervision for various forms of exercise and other recreational activities.
Student Services	Admissions Officer, Erasmus Exchanges Officer, Student Support Officer	Members of staff providing support directly or indirectly to students, that are not involved in the delivery of teaching or research.
Workshop and technical facilities services	Film & TV Technician, Glass Technician, Workshop Technician	Members of staff providing professional, technical, engineering and production facilities that support the University in research, teaching and supporting students.

Job

A job is a generic role within an organisation, for example Director, Administrator, Research Assistant or Analyst. We have rationalised the number of jobs we use in the University however there are approximately 350 jobs in the University. Given the volume of jobs and the evolving nature of the list we have not presented a full list of values for jobs.

Job Level

Job levels are linked to the Job. It is at Job level that we determine the level of authority as per the Delegated Authority Schedule (DAS). Job levels are applied to a job that is then applied to the position and then the employee's assignment.

If a job has more than one approval limit there will be more than one instance of a job level. Each job level says how much someone can approve. The table below summarises Job Levels and Financial Approval Limits taken from the DAS.

		General Ledger Approvals			
Job Level [i]	Approver - where defined in Delegated Authority Schedule (DAS)	Requisition Approval	Non-PO Invoice Approval	AP Credit Memo Approval	Expenses Approval
N/A	Committee - e.g. University Court	> £2m	> £50k	> £2m	> £100k
8	Principal	£2m	£50k	All values	100k
7	Head of College Head of Professional Services Groups (CSG/ISG/USG) Director of Finance Director of Estates	£1m	£50k	All values	£50k
6	Head of School/Department Dean of Deanery	£500k	£25k	All values	£10k
5		£100k	£10k	All values	£1k
4		£50k	£5k	All values	£500
3	Delegation to these job levels is defined by job within People and Money	£25k	£1k	All values	£100
2		£10k	None	None	None
1		£2k	None	None	None
0		None	None	None	None

(i) Job levels are not used for one-time payments (e.g. visitor expenses) or AR credit notes - they are approved by the requestor's line manager regardless of value.

		Projects and Grants Approvals			
Job Level [ii]	Approver	Requisition Approval	Non-PO Invoice Approval	AP Credit Memo Approval	Expenses Approval
N/A	Principal Investigator Project Manager (Estates)	£50k	£5k	All Values	£1k
N/A	Project Requisition Approver Role	£10k	None	None	None

(ii) Projects approval limits are linked to roles in the projects module rather than alloced through job levels. Where a project transaction is above the Principal Investigator/Project Manager approval limit it will be routed to their line manager for approval and refer to the line manager's job level approval limits.

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Job and job code are also used to route senior staff expenses to the University Secretary for approval rather than to their line manager, as specified in the [Delegated Authority Schedule](#). The Principal, Provost, Heads of College, Vice Principals and University Secretary must be assigned to a 'VP' job code and job, for example, VP08 Personal Chair (D1) (ACAD - Professorial) VP.

Position

Every employee sits in a position within the job classification structure. A position is:

- An instance of a job.
- A seat /slot in the organisation structure.
- May be filled by one or more people. All incumbents must have the same grade band and sit within the same department.
- Specific to an individual business unit.
- Examples – Personal Chair, Manager, Research Assistant, Veterinary Nurse, Finance Administrator.

Job Naming Convention

Every job follows a strict Job naming convention, the image below shows an example. The position name will mirror that of the job naming convention.

Please note: When an existing member of staff is appointed to the office of Head of School or Dean, they should be moved into a position prefaced with HoS or Dean followed by a space e.g. HoS Established Chair (D1) (ACAD - Professorial) or Dean Personal Chair (D2) (CLIN - Clinical Academic Consultant). Likewise, when they demit the office they should be return to a position without the HoS or Dean preface.

Job Name	Grade Band	Job Level Instance	Family Short Code	Function
Director	D	1	POA	Estates and Facilities

Each part of the naming convention has its own purpose:

Job Name	The generic job. All existing staff have been mapped into one of approximately 350 jobs.

Grade Band	For planning purposes, we have created a fictitious grade band. Some jobs at the University range over seven or eight grades which makes it difficult to use if you are planning, using salary mid-points. We have split the jobs so that they don't span over more than three salary grades. See Appendix 1 for a full list of Grade Bands.
Job Level Instance	This is used for the Delegated Authority Schedule (DAS). **If a job has more than one approval limit there will be more than one instance of a job level, for example D1, D2, D3**Each job level says how much someone can approve as per the DAS. Where there is more than one instance of a job level care should be taken to select the correct position. This should not be confused with the job level see further details below under Job Level Management.
Family short code	This is the abbreviated title for Job Family. This short code saves some space in the job title, for example POA for Professional, Administration and Operational, ACAD for Academic. (See the Job Family table above for the full list).
Job Function	The role or service you provide, for example Estates and Facilities, Researcher, Student Services, Finance. (See the Job Function table above for the full list).

Position Management

Requests for new positions or an amendment to an existing position can arise as a result of recruitment or job changes. During the recruitment process, for all posts including transfers and internal secondments you must check:

- There is an existing position available with the correct grade band and with available FTE
- The position chosen is correctly linked to a job with an appropriate job level. This will ensure where the role is required to undertake HR and Finance approvals that the job level on the position matches the authorised limits of the Delegated Authority Schedule (DAS).

Further information on employment and finance approvals is available within the Guide to Employment and Finance Approvals

A request for a new position or an amendment to an existing position may also arise where an individual is taking on an Academic Leadership role that requires the role holder to undertake HR and Finance approvals.

Further information on the end to end recruitment and job change processes are available within the Guide to Recruitment and Onboarding and Guide to Job Changes.

When to request a new position

New positions should only be requested when one doesn't currently exist within a specific department, with the appropriate job level for example you have a named individual on a research grant and there is currently no position in the organisational structure for that individual or when you have an existing position but the job level does not meet your requirement.

When to request a change of position.

The reason for change could be one or a combination of the below:

- When you need to increase/decrease the total FTE of a position, for example you have a current position with 2.0 FTE but you need to add an additional 1.0 FTE to the organisational structure to allow you to recruit an additional member of staff.
- You want to add a new grade within a grade band for an existing position. For example you have a position at a Grade 3 but need to add in a similar position at a Grade 4.
- When an existing member of staff wants to increase/decrease their hours and this changes the total FTE for that position within the structure.

How to request a new position or position change

All requests should be submitted via People and Money by following the process in the user guide How to request a new position or position change process (under recruitment and onboarding heading). Once submitted requests are checked and approved by HR Services.

The line manager hierarchy is also critical to the correct routing of both employment and finance approvals so it is important to review and if necessary update the line manager hierarchy following any position or role changes. Further information is available in the How to change manager and How to change direct reports user guides.

How to search for a position and view position details

School/Department Administrators (SDA's) will be able to view all positions (both filled and vacant within the structure) and the FTE against these in the position detail page.
1. From the home page navigate to My Client Groups > Show More > Workforce Structures > Position Details.
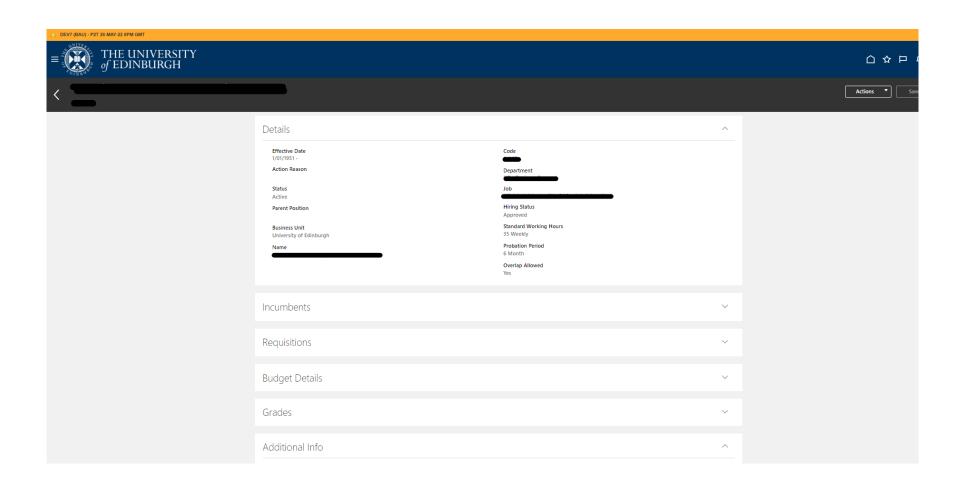2. Select Show Filters.

3. Search using filters, for example Position Name, Department, Location.
4. You will then see the list of positions in your school, who the current incumbent is or whether the position is vacant.

If you are unable to find the position within the Position Details tile, you can also establish the position number by going to My Client Groups>Person Management>Searching the person currently in post and selecting the ellipsis next to position will give you the position name and number.

Line Managers can view limited position details for their direct reports via the My Team>My Team App

Position Details Screen

THE UNIVERSITY
of **EDINBURGH**

Actions ▾   Save

Details

Effective Date
1/01/1951 -

Action Reason

Status
Active

Parent Position

Business Unit
University of Edinburgh

Name
▬▬▬▬▬▬▬▬▬▬

Code
▬▬▬▬

Department
▬▬▬▬▬▬▬▬

Job
▬▬▬▬▬▬▬▬▬▬▬▬

Hiring Status
Approved

Standard Working Hours
35 Weekly

Probation Period
6 Month

Overlap Allowed
Yes

Incumbents

Requisitions

Budget Details

Grades

Additional Info

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Job Level Management

When and How to Request a Change of Job Level

In the situation where a job level is incorrect and is preventing the approval chain in People and Money from working as expected, the position and job level needs to be reviewed.

The reason for a change of job level could include:

- Recruiting or transferring into a position where the current job level does not have the authority needed, in line with the [Delegated Authority Schedule (DAS).](#)
- Where an individual is taking on an Academic Leadership role that requires the role holder to undertake HR and Finance approvals.

To request the change please complete the [Job Level Change Form](#) and submit this via service request using the category Enquiry>System Related, please title this 'Job Level Change Request'. Please ensure the change has been approved by the Head of College/School or Professional Service Group or equivalent prior to submitting this. If you are completing the form on behalf of the approving manager, you must have their approval to do so. Confirmation of approval from the manager's UoE email account is acceptable proof that the manager has requested the change to be actioned on their behalf and should be attached to the service request along with the form.

How to view Job Level Details

Line Managers, Senior Managers and SDA's can view current Job Levels within the All Staff HR Report. For further information on how to view this report please see the [How to view HR Reports](#) guide.

Alternatively, School/Department Administrators (SDA's) can view job details for members of staff within their area of responsibility.
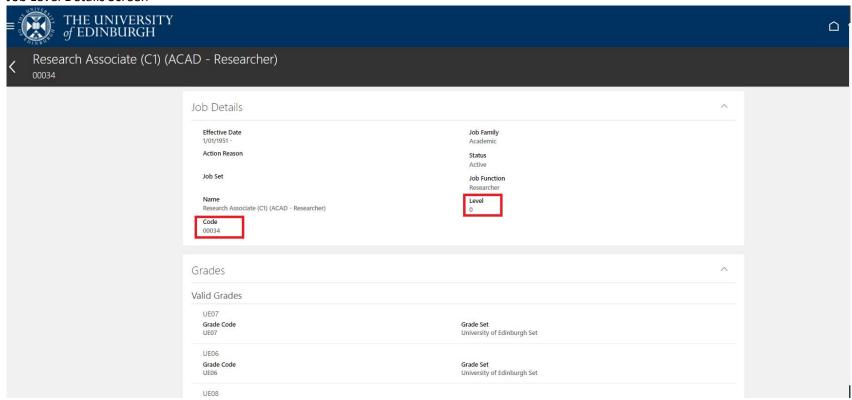
1. From the home page navigate to My Client Groups > Show More > Workforce Structures > Job Details.
2. Enter the full Position Name in the search field as it appears in the system e.g. 'Research Associate (C1) (ACAD – Researcher)' you can copy this from the position details screens as shown above, then click the search icon. Select Show Filters to view further search options, Job Name, Job Code, Job Family if required.

3. Click on the Job Name to view the Job Details. Within this screen, you can view the Job level. If the Job Code is prefixed with a 'VP' this indicates that the staff expenses for employees with that job are routed to the University Secretary for approval as outlined in the [Delegated Authority Schedule](#) (DAS).
4. If the Job Level is different to the one you require, search for another instance of that job e.g. C2, C3.

Currently, line managers and senior managers cannot view Job Levels in this way and should use the All Staff HR Report.

During the recruitment process care should be taken to ensure that the correct job level is used. If you are recruiting for a replacement or secondment you should use the same job level as the outgoing individual.

Job Level Details Screen

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Appendices

Appendix 1 – Grade Bands

Grade	Grade Band
AC3A	D
AC3B	D
ACN2	C
ACN3	D
ACN4	D
ACT3	D
ACT4	D
AM2	C
AM3A	D
AM3B	D
AMN2	C
AMN3	D
AMN4	D
AMT3	D
AMT4	D

ARC	A
ECA2	A
ECA3	A
ECA4	B
ECA5	B
ECA6	C
ECA7	C
ECA8	C
ECA9	D
ECAT	D
FAS5	B
FAS6	C
FAS7	C
NONE	AX
OTHS	DX
RCB3	CX
RCB4	CX
RCB5	CX
RCB6	BX
RCB7	BX
RCB8	AX
SDS1	A
TR01	C
UE01	A
UE02	A
UE03	A
UE04	B
UE05	B
UE06	C
UE07	C
UE08	C

UE09	D
UE10	D
UE5N	B
UE6N	C
UE7N	C
XM1	D
XM2B	D
XM3A	C
XM3B	C
XM4B	C
XM5B	C
XM6B	B
XM7B	A
MCA	C
MC1	C
AFC6	C
ECA05	C
XM5A	C
MC2	C
AFC7	C
ECA06	C
XM4A	C
AC2	C
MC3	C
ECA07	C
ECA08	D
XM2A	D
AC4	D
AM4	D
ECA09	D

ECA10	D
RCB2	DX