

Create Requisitions

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Introduction

A **Requisition** is commonly the first step in the hiring process. When a hiring manager determines that a new employee needs to be hired, the manager will submit this form for approval. The form typically includes the job description and essential job functions and any other information your company wishes to collect to help make an informed decision. The form will be reviewed to verify that the position is needed and that budget and other resources are available before being approved. Once approved, the form is used as the basis for creating a job listing and advertising the open position.

We have streamlined this process so that hiring managers can create and submit requisitions using an electronic version of your company's form. This expedites the entire process from creation through approval and ensures you have the information necessary to post the job opening.

This is a Premium feature. Admin users may contact the Support Team for pricing or to enable the **Requisition** feature.

This user guide explains how to create a Requisition and initiate the approval process. The person initiating the requisition can either start a requisition from scratch or copy a previous one.

Create a New Requisition

Choose the **Jobs** icon from the top of your screen, and then select the **Requisitions** tab.

Users must be given permission by an Admin user to view the Requisitions tab. If you do not see the Requisitions option, please contact an Admin user on your account.



Select the **+New Job Requisition** button to begin a new Requisition.

*****Note***** If you are using a mobile device to create a requisition, you will need to view the Main Requisition Tab page in landscape mode. Once you add a new Requisition or view an existing Requisition, it is viewable and can be approved in portrait mode.

Phoenix Holdings Jobs Dashboard

Job Questions Job Templates Job Listings Job Board Favorites Requisitions Job Ads Text To Apply

Requisitions Needing My Approval

Job Title	Date Started	Requesting User
Customer Support Representative	28-Mar-2022	Marvin Murphy

Requisition Title/ID All Department All Statuses Active Filter

Job Title	Department	Date Started	Requesting User	Current Status	Attached Job	Requisition ID
Customer Support Representative	Customer Service	28-Mar-2022	Marvin Murphy	In Process		102706
Customer Support Representative	Utah - 4400 - St. George	30-Aug-2019	Camijo Allied	Draft		92737
Customer Support Representative	Utah - 4400 - St. George	12-Jun-2019	Zilola Steva	In Process		86556
Customer Support Representative	Utah - 4700 - Provo	07-Mar-2019	Zilola Steva	In Process		79254
Warehouse Worker	Operations	08-Oct-2018	trakema Ongsoyco	In Process		69715
Accounting Clerk	Finance	08-Oct-2018	trakema Ongsoyco	In Process		69713
Customer Support Representative	Utah - 4400 - St. George	05-Oct-2018	Jill Peoples	Approved	Job Id: 1309641 - Customer Support Representative	69592
Customer Support Representative	Utah - 4800 - Downtown Salt Lake City	16-Aug-2018	HRViewing Manager	In Process		66026

New Job Requisition

- Select the **Job Template** from the drop-down menu that this requisition is for. Note that you will only be able to see those Job Templates associated with your assigned Departments.
- If you do not see a **Job Template** for the job you need to create a requisition for, select the checkbox to **Propose New Job Templates** and/or **Job Questions** to propose a new one. For detailed instructions on how to create a proposed requisition, please refer to the [Create Requisitions with a Proposed Job Template](#) user guide.
- If you have multiple Requisition Forms, you will also need to select the desired **Requisition Form**.

Add Requisition

Job Template: Select a Template...

Propose New: Job Template Job Questions

Requisition Form: Select a requisition form...

Cancel

Template Information

Complete the **Add Requisition** form, by answering all the questions required. The screenshot below is for your reference only, the form will be specific to your organization. Fields marked with an "*" are required and must be filled in before submitting.

- **Job Template** - This is the job template selected on the previous screen.
- **Proposed Job Title** - This is the job title pulled from the job template career site title. Note that this field can be edited as needed.
- **Number of positions** - Enter the number of positions you need to fill for this requisition.
- **Job Description** -
 - Show Ad Description - Click this button to view the Career Site Ad Description associated with the selected job template.
 - See or Attach Full Description - Click this button to view the [Full Job Description](#) if available.
 - If one was uploaded to the job template, a link is displayed. Click the **Full Description link** to download the description. You cannot add a different attachment because the one displayed is the one associated with the job template.
 - A message is displayed if the full job description was not attached to the job template. Click **Choose File** to select a full job description. When the requisition is saved, the full job description is added **ONLY** to this requisition. Edit the job template and add a full job description instead if preferred.
- **Department** - Select the department needed for this requisition. Note that Departments appear in alphabetical order by Parent/Child first and by Individual departments second.

Requisition Questions

Complete the Requisition Questions section. These questions will be unique to your career site and the selected requisition form.

Requisition Approvers

Choose the **Requisition Approvers**. Some or all of these may already be pre-populated depending on your user settings.

Click **Cancel** to exit the form without saving, **Save as Draft** to save the form without sending it to the approvers and allow future editing, or **Save and Begin Process** to submit the requisition for approval.

Add Requisition

Job Template: Accounting Clerk

Propose New: Job Template Job Questions

Requisition Form: General Requisition

Proposed Job Titles: Accounting Clerk

Number of Positions: 1

Department: *

Job Description:

Requisition Questions

General Information

When does this position need to start? *

Will this position need to be posted internally first? *

Requisition Approvers

Regional Manager* *

HR* *

VP of Finance* *

Copy a Previous Requisition

Rather than starting a new requisition from scratch, you may copy a previous requisition instead. This will reduce entry mistakes and make initiating a requisition faster.

From the Requisition dashboard, click the **Action** button for the prior requisition you wish to copy.

The **Copy Req Form** option is displayed for previous requisitions in any status other than those that are still in draft.

Phoenix Holdings - Jobs Dashboard

Job Listings All Applicants Requisitions

You can initiate a requisition from this screen. We made a change to how you attach an approved requisition to a job listing and added some new options. For a walk through of the updates, [click here to watch a quick video](#).

Requisition Title All Department All Statuses Both Filter

Job Title	Department	Date Started	Requesting User	Current Status	Attached Job	Requisition ID
Action Customer Service Representative	Utah - St. George	23-Feb-2022	Store 4400 Manager	Denied		176544
Action View Details Service Representative	Utah - St. George	23-Feb-2022	Store 4400 Manager	In Process		176541
Action Archive Service Representative	Utah - St. George	23-Feb-2022	Store 4400 Manager	Denied		176539
Action Copy Req Form Service Representative	Utah - St. George	30-Aug-2019	Store 4400 Manager	Draft		92737
Action Customer Support Representative	Utah - St. George	12-Jun-2019	Assigned User87	Approved		86556
Action Customer Support Representative	Utah - St. George	05-Oct-2018	Store 4400 Manager	Approved		69592

All of the original information is copied over, except for the Requisition history and the attached/detached job listings, if applicable.

Make any changes needed, including updating selectable approvers.

Click **Cancel** to exit the form without saving, **Save as Draft** to save the form without sending it to the approvers and allow future editing, or **Save and Begin Process** to submit the requisition for approval.

Approval Process

Each approver listed in sequence, starting with the first, will receive an email containing the information for approval or denial of the requisition. After approval is given, the next approver will receive an email requesting approval. This will continue until each approver has approved the requisition.

The approval workflow is slightly different depending on whether the approving user is a system user or not.

Review the [Approve Requisitions](#) user guide for detailed instructions on how system users can approve requisitions.

Review the [Requisitions - Approval Only Users](#) user guide for detailed instructions on how non-systems can approve requisitions.

Connect Job Listings and Requisitions

Once the requisition has been fully approved, Admin users and Job Posting Managers can create a job listing from it or it can be attached to an active job.

Review the [Create Job Listings from Requisitions - Attach Requisitions to Job Listings](#) user guide for detailed instructions.

Common Questions

Why don't the questions answered in the requisitions import into my job listing automatically?

At this point, the requisitions are customizable, which means they cannot be imported. In the future, there may be more default fields that are common to most requisitions that automatically import information, but at this time only the department and title fields import.

How does Req Mass Update work?

Approvers set up in Req Mass Update will override approvers set up on any individual profile. For more information, click the user guide for the [Requisitions - Mass Update Feature](#) and the article [How does the Requisition Mass Update Work?](#). Only one user is allowed per Req Mass Update group in requisitions, meaning you can't have the same person/user appear in multiple groups.

Can I change the order of the approvers or take back an approval?

You can use the bypass feature if any approver needs to be bypassed. However, once a requisition is started and the approvers are set, you cannot change the approvers. You can make changes to the requisition form other than the approvers until it is fully approved.

Who has access to see the requisitions?

If a user has been given access to requisitions, they will see requisitions according to their user type. Admins will see all requisitions, managers will see requisitions within their department, and assigned users will see requisitions they have submitted. If your organization has multiple career sites, and you are an Admin user with access to more than one career site, the requisition will only appear in the original career site it was created in. This means that Admin users will only be able to view a requisition in its original career site. For Non-Posting Managers and Viewing Managers who have access by Job Listing rather than by Department, they can start a requisition for any department, since they don't have department access. Once the requisition is approved and attached to a job, if they don't have access to that job, they can't see the job listing or the applicants. They will be able to *see all requisitions*, regardless of department. Assigned users can only view requisitions they created or need to approve.

Does an approver have to be a user in the system?

No, you can have approval-only users who only have access to view/approve requisitions. They are notified via email and can approve or reject requisitions and add notes. See the related article below on this type of user.

What if I don't set the Requisition Approver to anyone?

If the Requisition Approver is not set to anyone, the user can choose from a list of users who they want to approve their requisition. This list includes the creator of the requisition.

What does a user see if they don't have access to any requisitions?

They will see a No Results message. It reads: "No job requisitions to show. Only requisitions you have created will show here. Please adjust your filter settings and try your search again".

I added a requisition to the wrong job listing. Can I undo that?

As of April 2022, yes you can. Reports only show the current Job Listing attached to the Requisition. Then, click **Action>Detach Job Listing** for the desired requisition. Follow the steps to detach the job listing, then click **Action>Attach Job Listing** to attach the correct one.

Can I delete a requisition?

For auditing and reporting purposes, requisitions cannot be deleted. However, please contact our Support Team for assistance in archiving or otherwise managing your requisition templates.

Related Articles

[Approve Requisitions](#)

[Requisitions - Approval Only Users](#)

[Create Job Listings from Requisitions - Attach Requisitions to Job Listings](#)

[Requisitions - Mass Update Feature](#)

[Grant Requisition Access to Users](#)

[Print Requisitions](#)

[Is there a Requisition report?](#)

[How do I create a requisition when there is no existing job template](#)

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