Named Researcher Recruitment Request - Hiring Manager User Guide

This document will provide you with step-by-step guidance on how to:

- Create a Named Researcher Opportunity/Vacancy including copying Vacancies
- Reviewing a Vacancy saved as "Draft" and releasing for approval
- Create an offer for a Named Researcher and attaching additional documents to an application page
- Give other users access to an Opportunity

Throughout this document, the words '*Opportunities*' and '*Vacancies'* are used interchangeably as well as '*Named Researcher*' and '*Applicant*'.

IMPORTANT NOTE: A Named Researcher Opportunity can only be requested in cases where an individual is specifically named on a Grant Award. See Recruitment Policy section 5.3.5 for confirmation of the documentation that can be accepted as proof that an individual is named on a grant. The Opportunity will be returned to the Hiring Manager if it is incorrectly categorised as a Named Researcher.

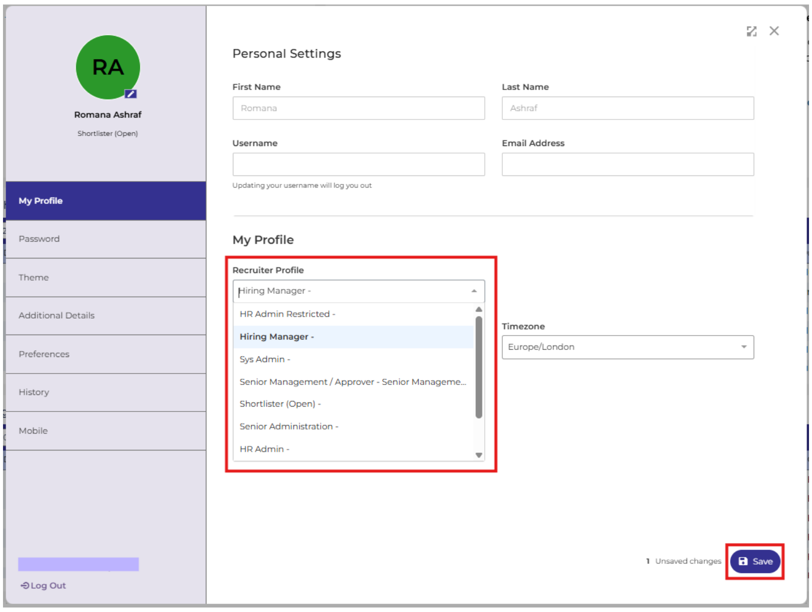
Where a post is not being advertised for any other reason (outside of the Named Researcher route), please raise a Standard Recruitment request.

<table>
<tr><th colspan="2">Accessing Oleeo</th></tr>
<tr><th>Step/Action</th><th>Example/Screenshot</th></tr>
<tr><td>To access Oleeo, use this link: https://qmul-jobs.tal.net/ and click on "Log in with single sign on" to log into the system.

Note: You must be logged in with a "Hiring Manager" or a "Faculty Hub" profile to be able to create an Opportunity.

When you log into Oleeo, you will be presented with your homepage known as your Dashboard.

To switch your profile:
i. Select your name in the left-hand menu.
ii. Under "My Profile" select the profile you wish to switch to in the "Recruiter Profile" field.
iii. Click "Save".

The profile will now switch and load the relevant dashboard.</td><td>
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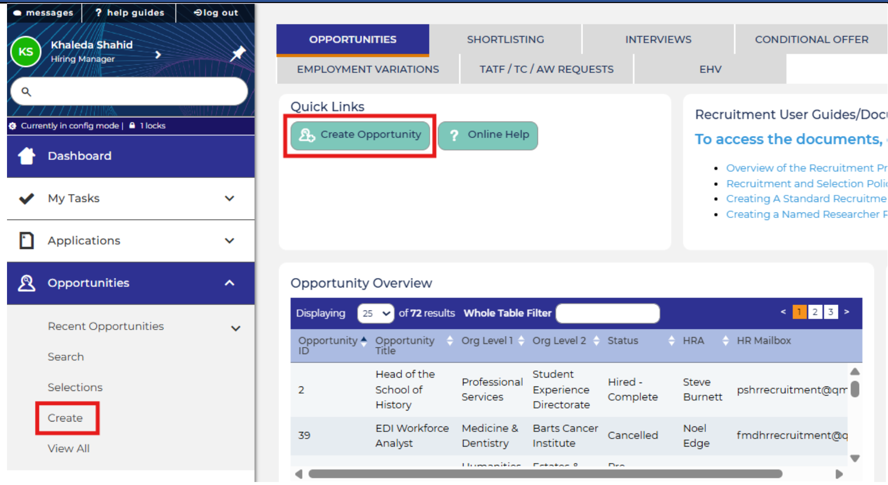
Creating a vacancy

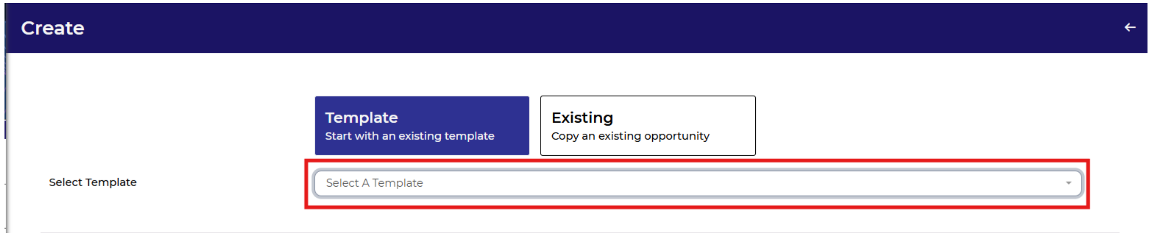
1) Select the "**Create Opportunity**" button in the "*Quick Links*" box on your Dashboard which will load the "Create" screen.

Note: You can also select "**Create**" under the "**Opportunities**" section in the left-hand menu.

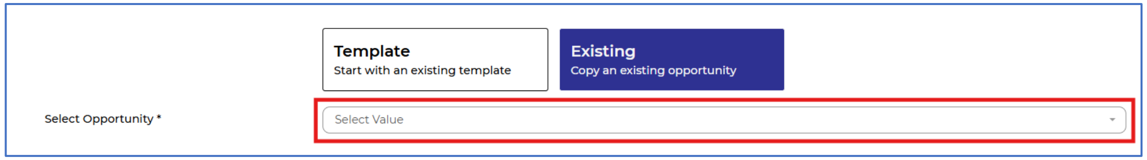
Quick Tip: If you are on a screen other than the "***Opportunities***" tab on your dashboard, enter the word "***create***" in the search box in the left-hand menu and then click on the result that appears. This will launch the Opportunity request Form for you to complete.



2) On the Create screen, choose either to:
   i. Start with an existing template by selecting the "**Template**" tile **or**
   ii. Copy an existing Opportunity by selecting the "**Existing**" tile.

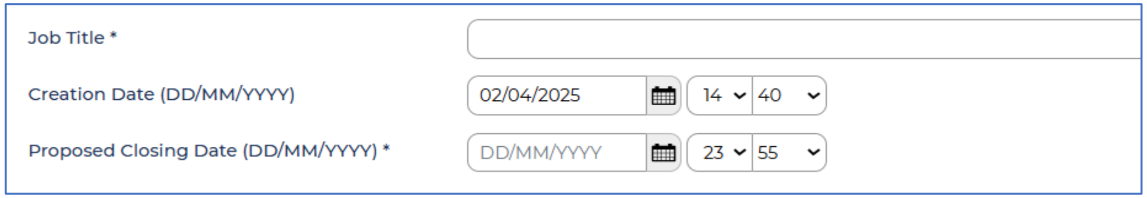


If you select the "**Template**" tile, you will need to select the **Named Researcher** template.



If you select the "**Existing**" tile, you will need to enter the Opportunity number you wish to copy in the "**Select Opportunity**" field. This will load a copy of your previously submitted request. You can then proceed to editing the form before submitting.

3) Enter the "**Job Title**" and a "**Proposed Closing Date**" which must be 3 months after the creation date. "**Creation Date**" is auto populated and should be left as is.



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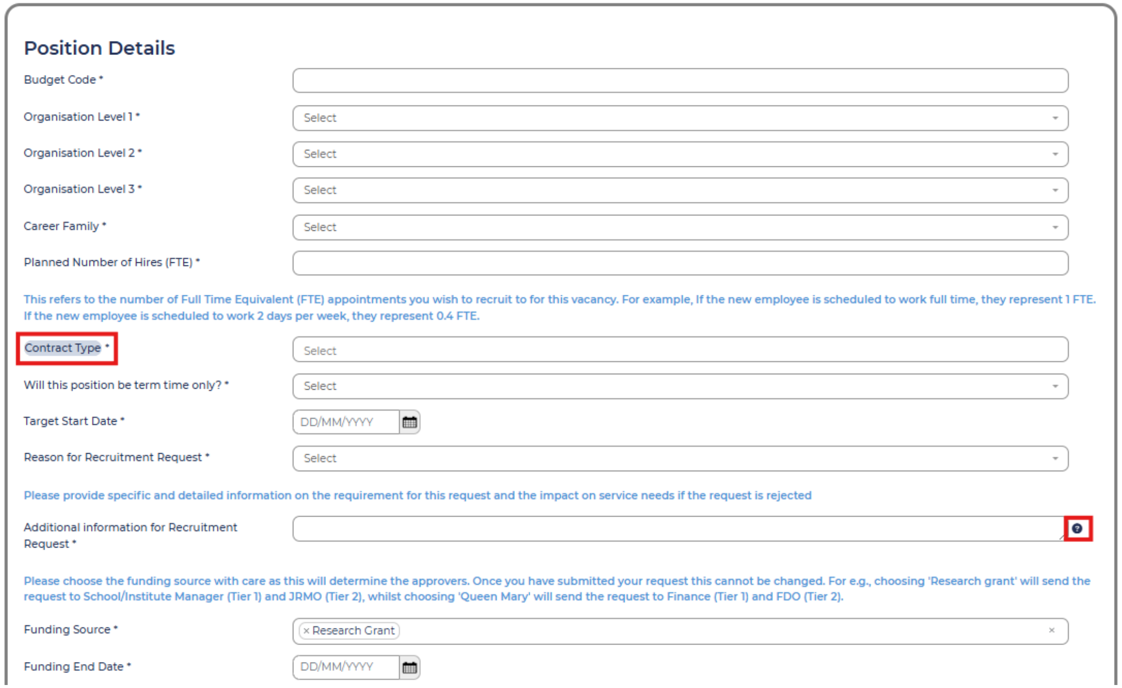
4) Complete the **Position Details**. Mandatory fields are marked with an asterisk (*). The question mark bubbles provide extra help if you hover over them.

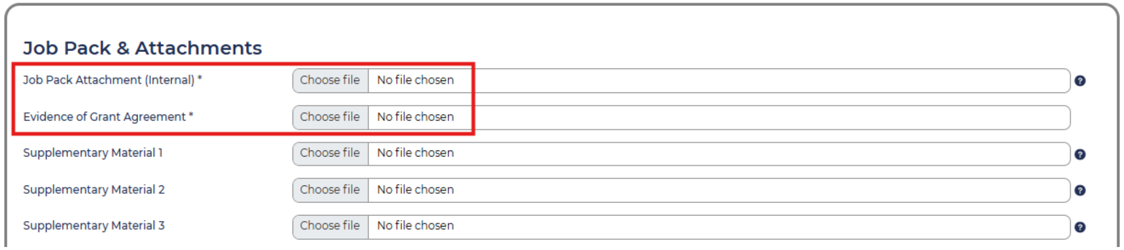
Note: Certain fields will prepopulate according to the template selected. It is important you double-check that these details are correct.

Important note: Blue shaded fields indicate items that will be visible to Applicants once an offer letter is issued.



5) Attach the **Job Pack and associated documents**.

- **Job Pack:** Must be uploaded in Word format and be on the most recent template which can be found on the HR website.
- **Evidence of Grant Agreement:** Must name the individual on the grant for direct appointment. For a Named Researcher post, documents accepted as proof of named researcher status are as follows;
  - the individual's name (FIRST NAME, SURNAME), typically captured within the Staff and Investigator DI costs section of the grant award letter or;
  - a confirmation letter from the Grant Award Body detailing the named researcher status of the individual against the specific award.
- **Supplementary Material:** You can attach supplementary material here. Documents must be uploaded in PDF format.



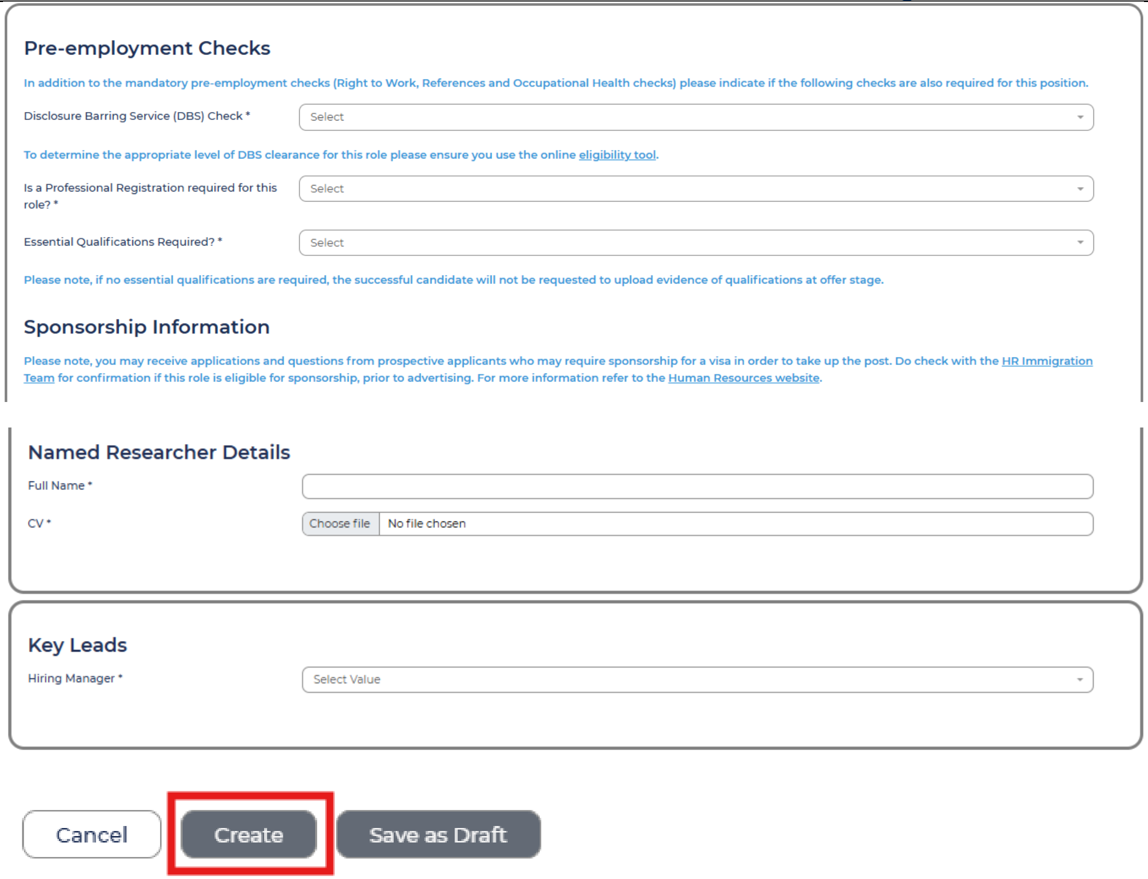
6) Complete the **Pre-employment Checks** section. This section will determine the workflow for the successful candidate's pre-employment checks. For Sponsorship information, ensure you contact the [HR Immigration Team]() beforehand to check if a post is eligible for Skilled Worker or Global Talent sponsorship.

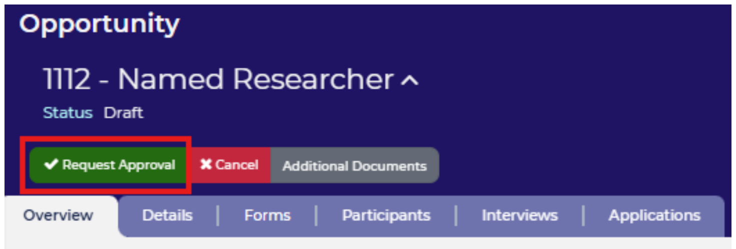
7) Complete the **Named Researcher Details** section. Enter the full name of the researcher and attach their CV.

8) Enter the **Key Lead** for the position. The Hiring Manager indicated here will receive all automated notifications for this vacancy.

9) Once you are happy with the details on the form, click "**Create**".
   If you have missed any mandatory fields and wish to return to the position, click "**Save as Draft**", and follow the "[reviewing and releasing a saved draft]()" guidance below. Otherwise, continue to Step 10.

10) You will now see the Opportunity ID, Title and Status. Click the green "**Request Approval**" button. Once selected, the status will change to "**Awaiting Tier 1 Approval**" and the Tier 1 Approver will automatically be sent an approval request email. You will also receive an email to confirm that the Opportunity has been submitted for approval.





Note: Once you have submitted the form for approval, you will ***not*** be able to make any changes. To review the form before clicking the "**Request Approval**" button, go to the "***Forms***" tab and click on the first row. You will be able to make changes to the form if you need. Ensure you click "**Submit**" at the bottom of the form to save the changes and then click "**Request Approval**".

On Oleeo, there is a 2 Tier approval system. The approver workflows are as follows:

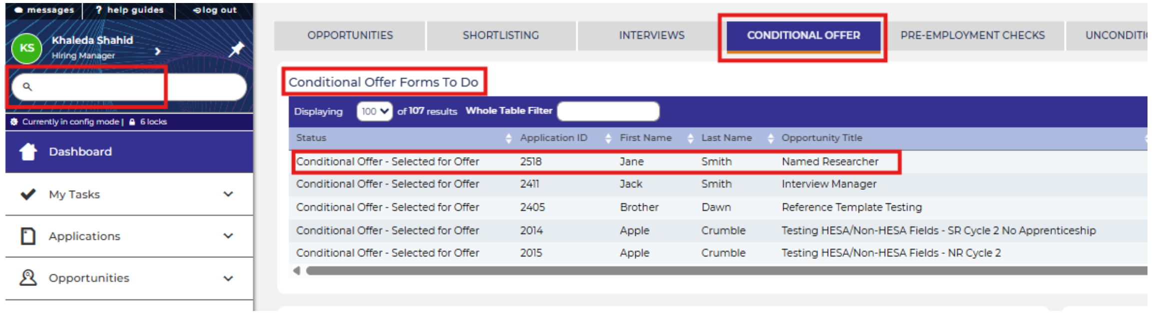
- **Research Grant funded** requests will be sent to the Faculty Research Grant Manager (Tier 1) and then JRMO (Tier 2),
- **Queen Mary funded** requests will be sent to Finance (Tier 1) and then Faculty Director of Operations (Tier 2).

Once the post has been fully approved, it will go to the HR Recruitment Team to review and action. Once the Recruitment Team have completed their part of the process, you will receive an email to notify you to create the offer on Oleeo. Follow the guidance on the next page for creating an offer.

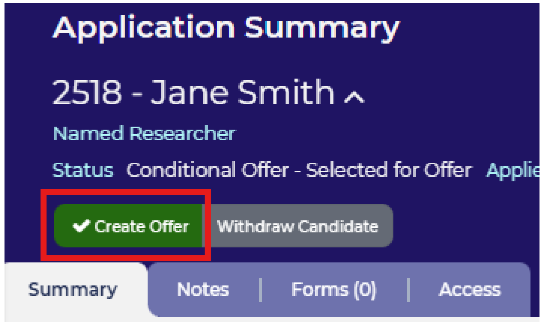
How to create an offer

Step/Action	Examples/Screenshots

1) Access the Application page by either:
    i. Clicking on the "Oleeo" link in the email notification you received to take you directly to the Application. **OR**
    ii. Search in the left-hand side menu entering the Application Name or ID and click on the Application in the results returned. **OR**
    iii. Double click on the individual you wish to create an offer for in the "**Conditional Offer Forms To Do**" box in the "***Conditional Offer***" tab on your dashboard.



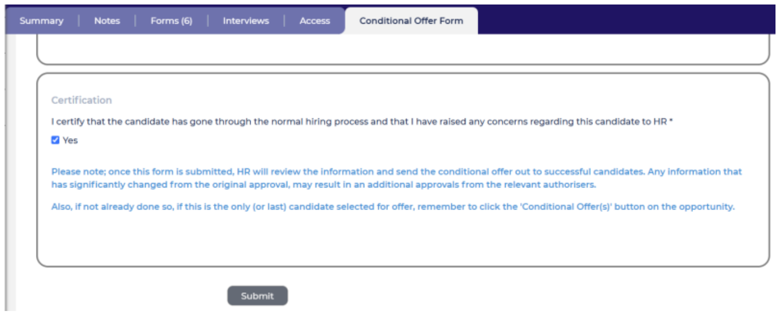
2) On the Applicant page, select the green "**Create Offer**" button. This will launch a "**Conditional Offer Form**" which you must complete in full.



Note: You will need to complete the conditional offer form in one sitting. There is no option to save the form and come back to it later.

3) Complete all the mandatory fields marked with an asterisk (*). The question mark bubbles provide extra help if you hover over them. Certain fields will pre-populate according to the original request. **It is important you double-check that these details are correct.**

4) After completing the form, click "**Submit**".



Upon submission of the form, the Application status will change to "**Conditional Offer - HR Admin Review**".

The offer form is now with the Recruitment Team to review. Once they have reviewed the details, they will send a Conditional Offer Letter to the applicant. You will be copied into the email sent to the applicant when the Conditional Offer is sent. The Conditional Offer Letter will include key information about the offer such as job title, contract type, salary etc. The offer details are based on what has been entered on the Conditional Offer Form.

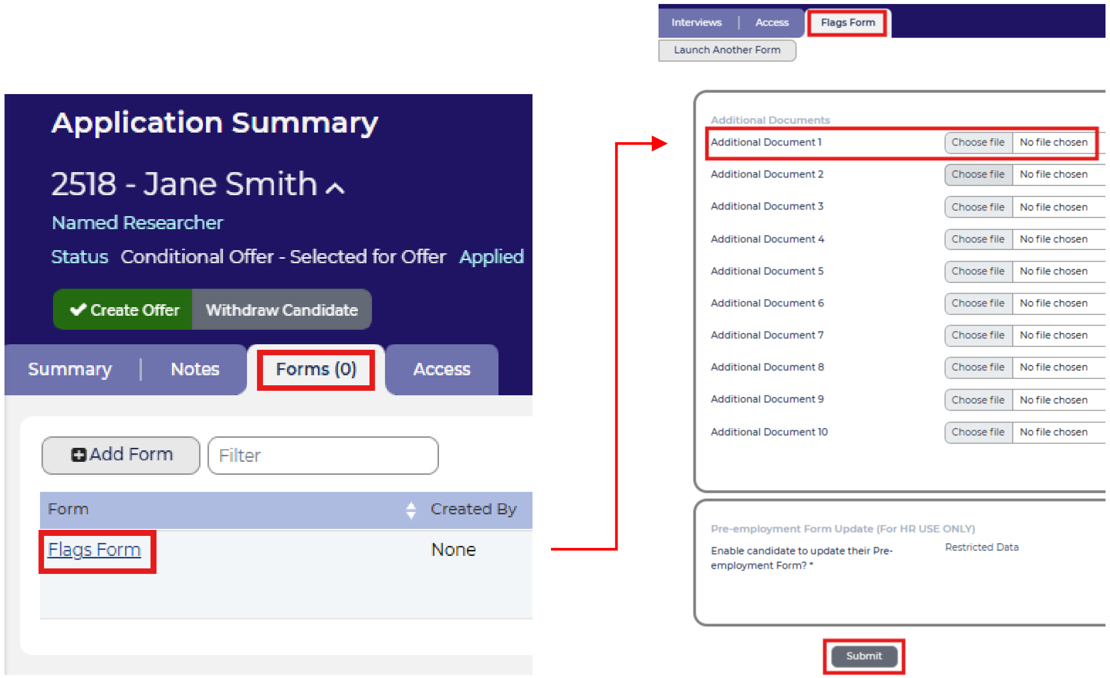
Note: If the offer differs from the original Opportunity request, the status of the Applicant will automatically change to "**Awaiting Approval**", commencing the approval process again. Once approved, the Recruitment Team will be alerted and follow the same process as above.

Changes to any of the below parameters, will trigger an approval process:

- Organisation Level 1
- Grade/Pay Group
- An increase in FTE
- An increase in working hours

Once the applicant has accepted their Conditional Offer, they will go through the same pre-employment checks as standard recruitment including the requirement of obtaining two references. Applicants must complete all mandatory pre-employment checks satisfactorily before a contract of employment can be issued. See the separate guidance on how to check and manage pre-employment checks on Oleeo.

How to attach documents to an Applicant’s page

Step/Action	Examples/Screenshots
You can attach up to 10 additional documents to a candidate’s Application page. 1) On the Application page, select the “***Forms***” tab, “***Flags Form***” which will open the Flags Form. 2) On the Flags Form, upload your documents and then click “**Submit**” at the bottom of the form to save the changes. 3) Remember to add a note under the “***Notes***” tab so that the Recruitment Team are aware of any additional documents that you may have uploaded.	

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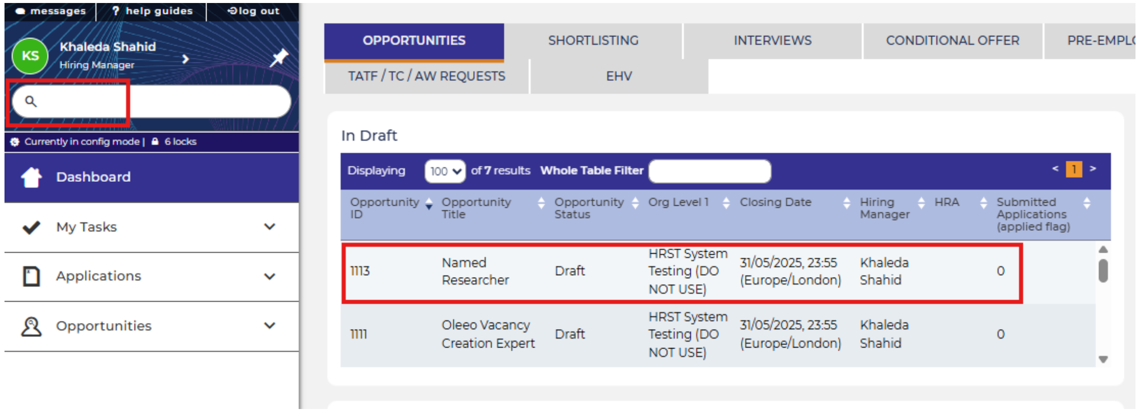
Reviewing a vacancy saved as “Draft” and releasing for approval

Step/Action	Example/Screenshot

1) Locate your draft Opportunity by either:
   i. Scrolling down on your dashboard in the “***Opportunities***” tab to the “**In Draft**” widget and double click on the draft Opportunity you wish to review and edit. **OR**
   ii. Search in the left-hand menu entering the Opportunity Title or ID and then click on the Opportunity in the results returned.

Quick pro tip: If you know the Opportunity ID, you can navigate straight to the Opportunity using the prefix “**v:**” followed by the ID. For example, if the Opportunity ID is “*1113*” enter “*v:1113*” and press enter.



2) Once you have landed on the Opportunity page, select the “***Forms***” tab and click on the first row.

3) Review the form and make the necessary changes.

4) Ensure you click “**Submit**” at the bottom of the form to save the changes.

5) To take the Opportunity out of draft, ready for approval, click the grey “**Save Draft**” button. The status will remain as “**Draft**” but you will see the “**Request Approval**” button.

6) Click the green “**Request Approval**” button. Once selected, the status will change to “**Awaiting Tier 1 Approval**” and the Tier 1 Approver will automatically be sent an approval request email.
   You will also receive an email to confirm that the Opportunity has been submitted for approval.

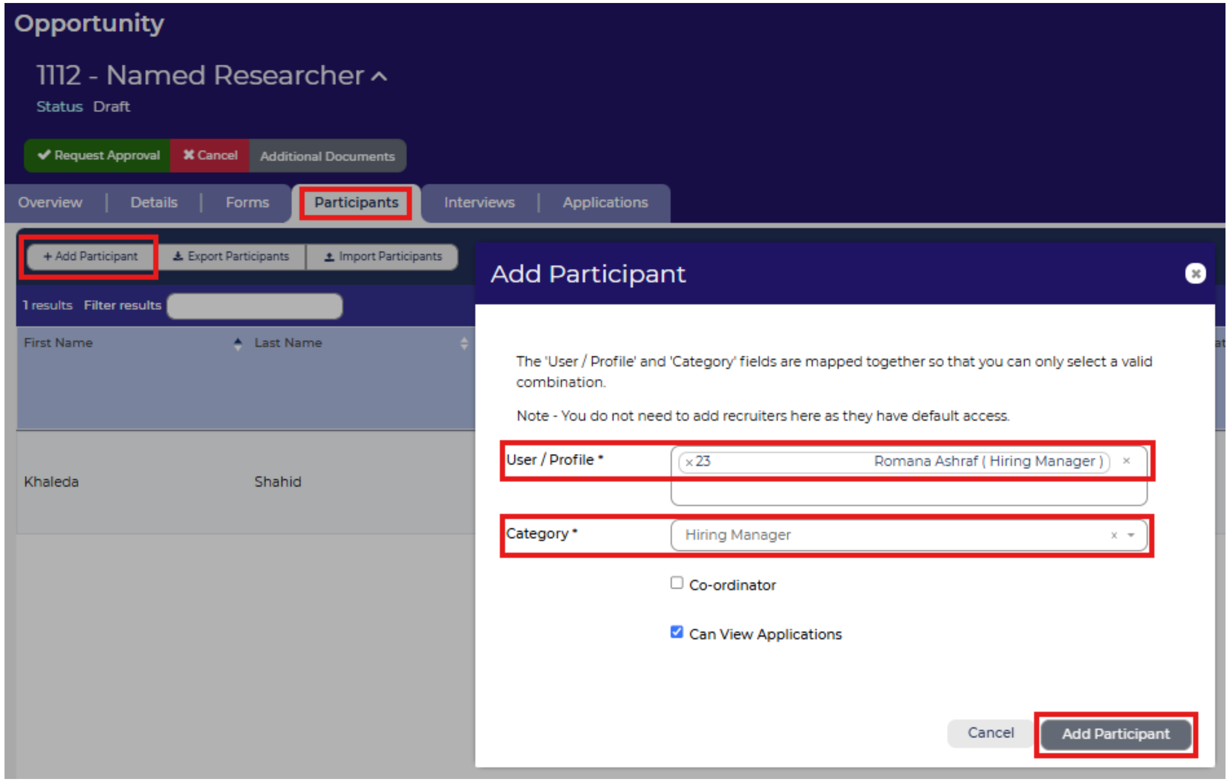
<table>
<tr><th colspan="2">Giving access to others</th></tr>
<tr><th>Step/Action</th><th>Example/Screenshot</th></tr>
<tr><td>To give others the same access as a Hiring Manager to the Opportunity and Application, you will need to add them to the “Participants” tab.

1) On the Opportunity, under the “Participants” tab, select “Add Participant”.

2) Search for the individual you wish to add in the “User/Profile” field and ensure that the “Category” matches. It should be a Hiring Manager profile.

3) Tick “Can View Applications”.

4) Select “Add Participant”.

If an individual does not have the required profile, they will need to contact the <u>IT Service Desk</u> to request it.</td><td>
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