Raising a TATF or Bulk Engagement Contract Request - Oleeo User Guide

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

- Create a TATF or bulk engagement contract request including copying requests
- Reviewing a request saved as "Draft" and releasing for approval
- Give other users access to an Opportunity

Throughout this document, the words '*request*' and '*Opportunity*' are used interchangeably.

Important Note: The TATF/Other Bulk Engagements template should be used for raising new and additional contract requests for bulk engagements including TATFs, Demonstrators, Student Ambassadors, Invigilators, SU casuals, CBME Tutors etc.

Contract variations for TATFs and other Bulk engagements must also be submitted using the same TATF/Other Bulk Engagements template.

For temporary part year contracts (different to bulk engagements, which include set hours and casual worker agreements) use the "Temporary Contract" template and follow the "Raising a Temporary Contract Request" guidance.

<table>
<tr><th colspan="2">Accessing Oleeo</th></tr>
<tr><th>Step/Action</th><th>Example/Screenshot</th></tr>
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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.

<u>Note</u>: You must be logged in with a "Hiring Manager" or "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 the profile, you are on:
<ol type="i">
Select your name from the left-hand menu.
Under "My Profile" select the profile you wish to switch to in the "Recruiter Profile" field.
Select "Save".

The profile will now switch and load the relevant dashboard.
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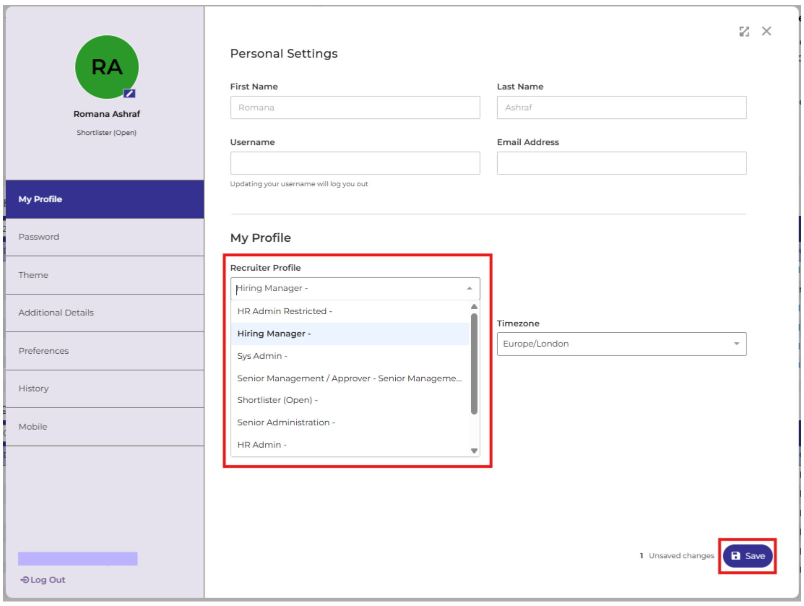

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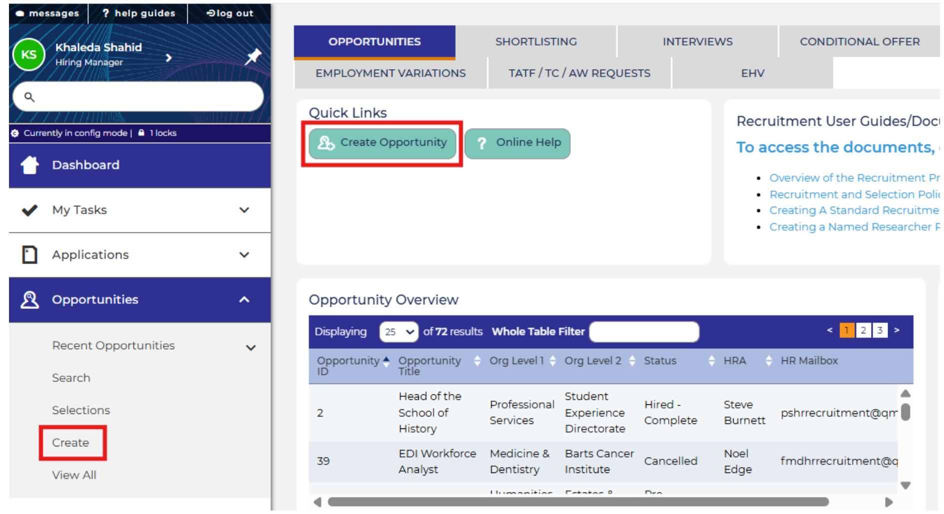
Creating a TATF or bulk engagement contract request

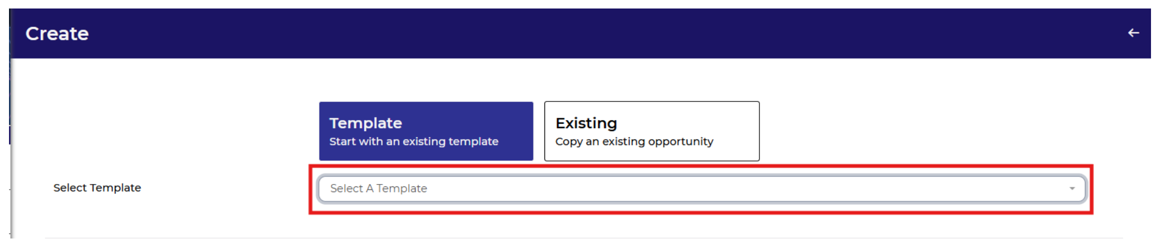
1) Select the “**Create Opportunity**” button in the “*Quick Links*” box on your Dashboard which will load the “Create” screen.

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

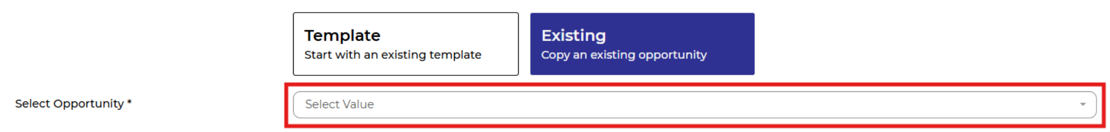
Quick Tip: If you are on a screen other than the “***Opportunities***” tab on your dashboard, enter the word “***create***” in the search box and then click on the result returned. This will launch the Opportunity Form.



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.

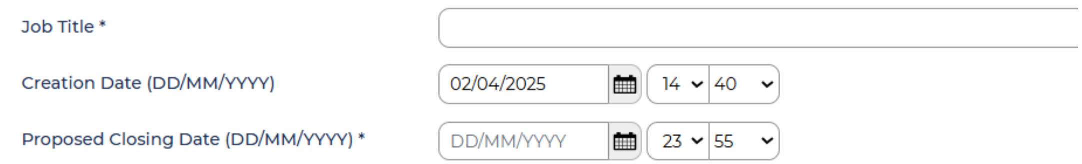


If you select the “**Template**” tile, you will need to select the **TAFT/Other Bulk Engagements** template.



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.

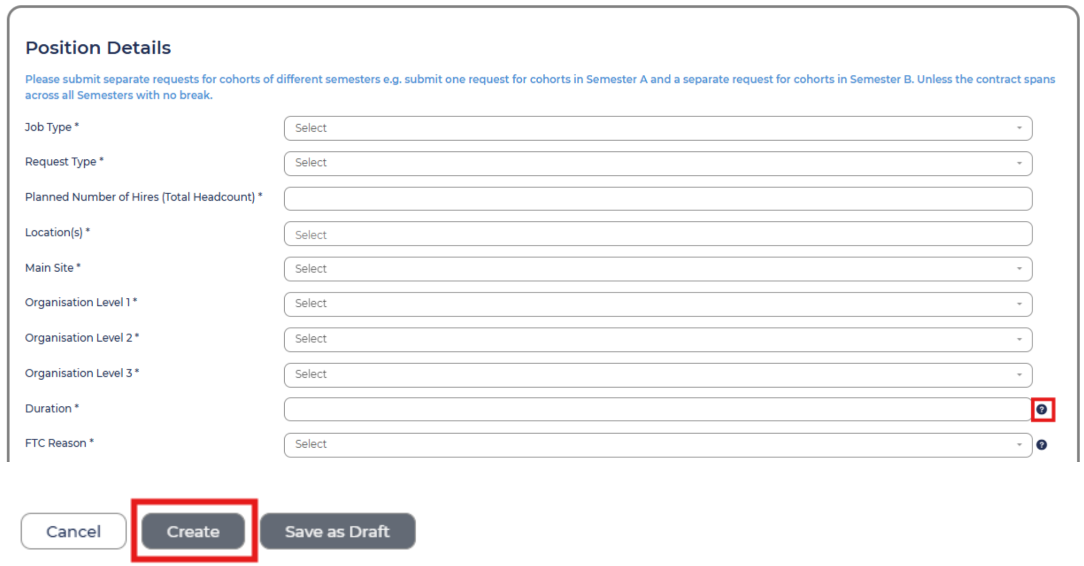
3) Enter the "**Job Title**" and "**Proposed Closing Date**". The proposed closing date does not have an impact on the request itself but must be at least 3 months after the creation date.
"**Creation date**" is auto populated and should be left as is.



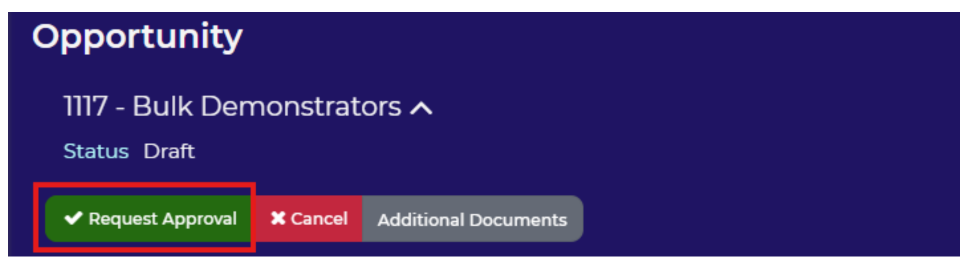
Note: The Job Title should be appropriate to the position you are recruiting into. Once the form is submitted, you will not be able to amend the title.

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

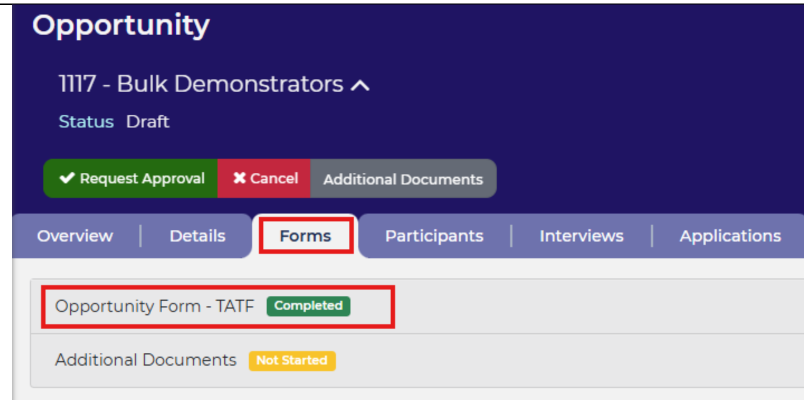
5) Once you are happy with the completed form, click "**Create**".
If you have missed any mandatory fields and wish to return to the position, click "**Save as Draft**", and follow the "[reviewing and releasing a saved draft]" guidance below. Otherwise, continue to Step 6.



6) 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 HR (tatfandtempenagements@qmul.ac.uk) to review and action.

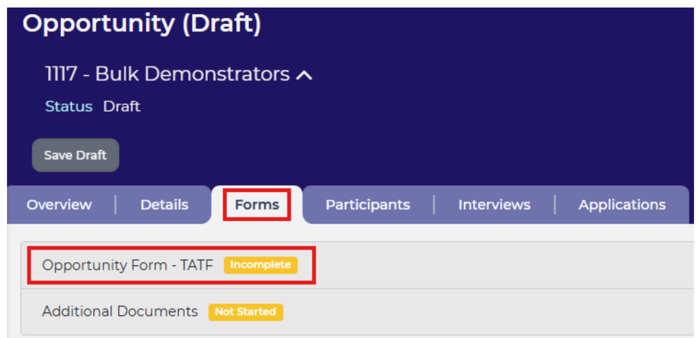
Reviewing a request saved as “Draft” and releasing for approval

Step/Action	Example/Screenshot

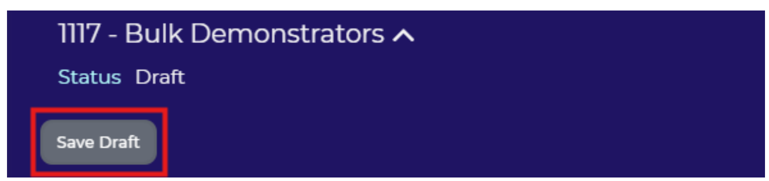
1) Locate your draft Opportunity. To do so, you can either:
   i. Use your **Dashboard**. Go to the “**TATF/Bulk Engagement Requests**” widget on the “***TATF/TC/AW Requests***” tab and double click on the draft Opportunity you wish to review and edit. **OR**
   ii. Search in the left-hand menu typing in the Opportunity Title or ID and then single selecting the Opportunity in the results returned.

Quick pro tip: If you know the Opportunity ID, you can go straight to the Opportunity using the prefix “**v:**” followed by the ID. For example, if the Opportunity ID is “*1117*” enter “*v:1117*” and press enter.

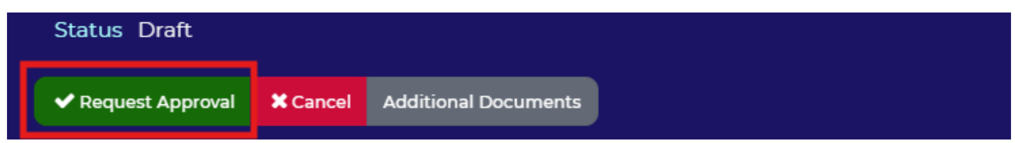
2) Once you have landed on the Opportunity page, select the “***Forms***” tab and click on the first row.
3) Review the form and make the necessary changes.
4) Ensure you click “**Submit**” at the bottom of the form to save the changes.



5) To move the Opportunity out of draft and start the approval process, click the grey “**Save Draft**” button. The status will remain as “**Draft**” but you will be presented with 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.



Giving access to others

Step/Action

To give others access 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.

Example/Screenshot