Raising a Temporary Contract Request - Oleeo User Guide

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

- Accessing Oleeo
- Create a temporary contract request including copying previous 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 Temporary Contract template can be used for raising requests for new or additional temporary part year contracts both for set hours or casual worker agreements. This must ***not*** be used as a mechanism to avoid following the standard recruitment process to make a fixed term appointment.

For contract variations to temporary contracts, use the "Contract Variation Request" template and follow the "Raising a Contract Request" guidance.

For bulk engagements including TATFs, Demonstrators/Student Ambassadors/Invigilators/ SU casuals/CBME Tutors etc. use the "TATF/Other Bulk Engagement" template and follow the "Raising a TATF/Bulk Engagement Request" guidance.

Mandatory Documentation that must be uploaded to the Oleeo request:

- Individual's CV
- Verified and original Right to Work documentation
- Personal Details Form
- Job pack /summary of duties*
- Evidence of qualifications that are listed as essential
- 1 x employment reference (if individual is not a Queen Mary Student)

*If the role is brand new or has been significantly altered it must go to the HR job grading panel.

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Accessing Oleeo

<table>
<tr><th>Step/Action</th><th>Example/Screenshot</th></tr>
<tr><td>
To access Oleeo, use this link: <u>https://qmul-jobs.tal.net/</u> 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 your profile:
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Select your name in the left-hand menu.
Under “My Profile” select the profile you wish to switch to in the “Recruiter Profile” field.
Click “Save”.

The profile will now switch and load the relevant dashboard.
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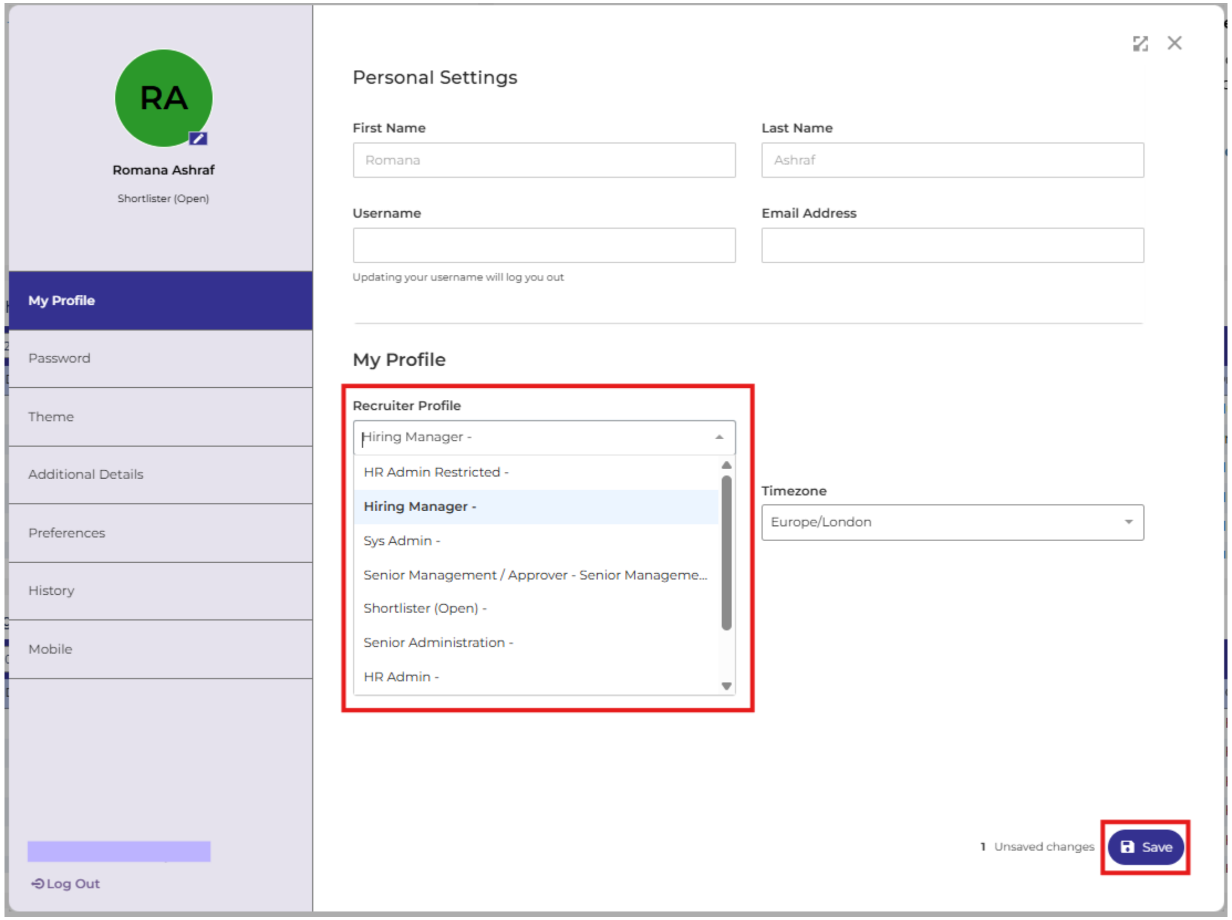

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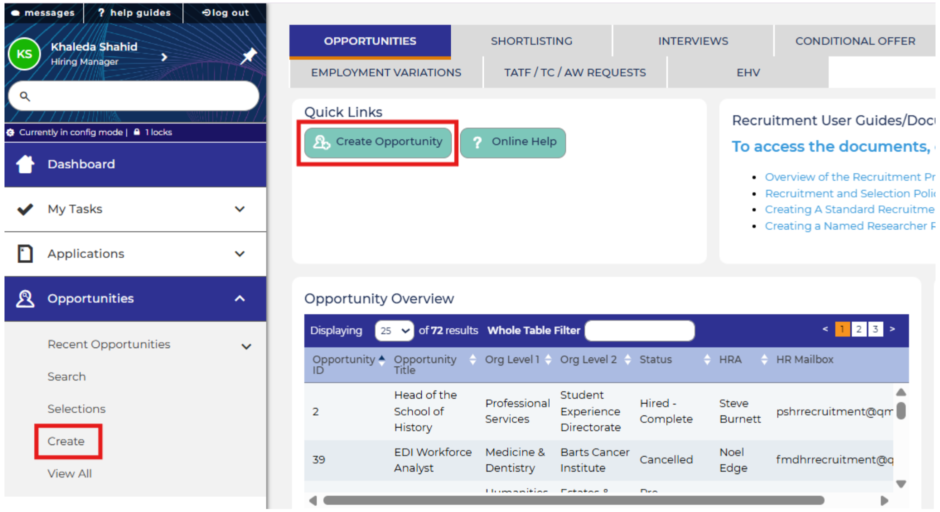
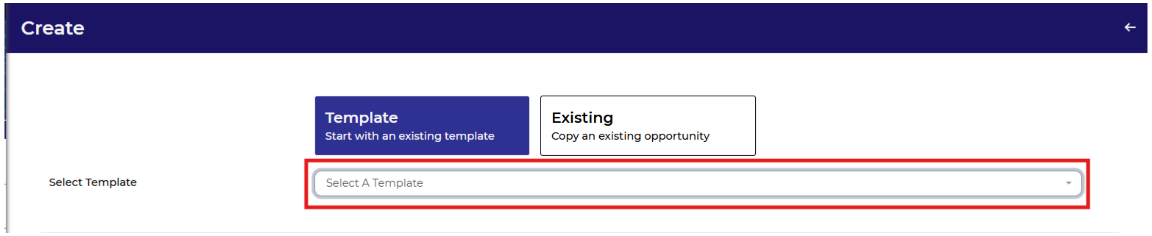
Creating a temporary contract request

1) Select the "**Create Opportunity**" button in the "*Quick Links*" box on your Dashboard **OR** Select "**Create**" under the "**Opportunities**" section in the left-hand menu. This will load the "Create" screen.

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 appropriate option that appears. This will launch the Opportunity Form for you to create.



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



If you select the "**Template**" tile, select the **Temporary Contract** 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.

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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.

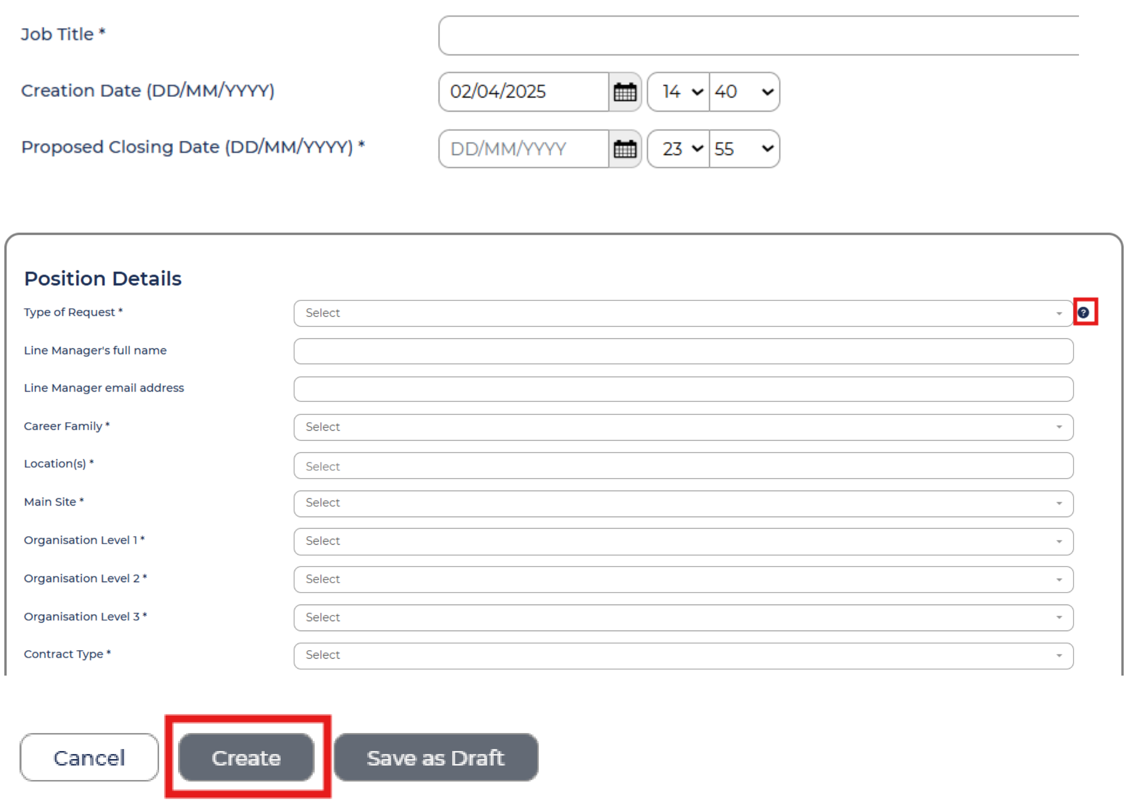
Note: The Job Title must be appropriate to the position you are recruiting into. Once the form is submitted, you will not be able to amend the title.

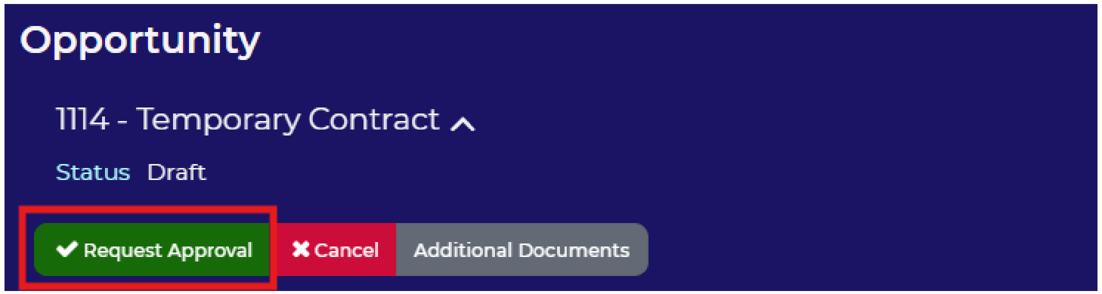
4) Complete the **Position Details**. Mandatory fields are marked with an asterisk (*). The question mark bubbles provide extra help if you hover over them.

5) Upload all the mandatory documents mentioned on the [first page](#) of this guide.

6) Once you are happy with the completed form, click "**Create**".
If you have missed any mandatory fields and wish to return to the position at a later time, click "**Save as Draft**", and follow the "[reviewing and releasing a saved draft](#)" guidance below. Otherwise, continue to Step 7.

7) 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.





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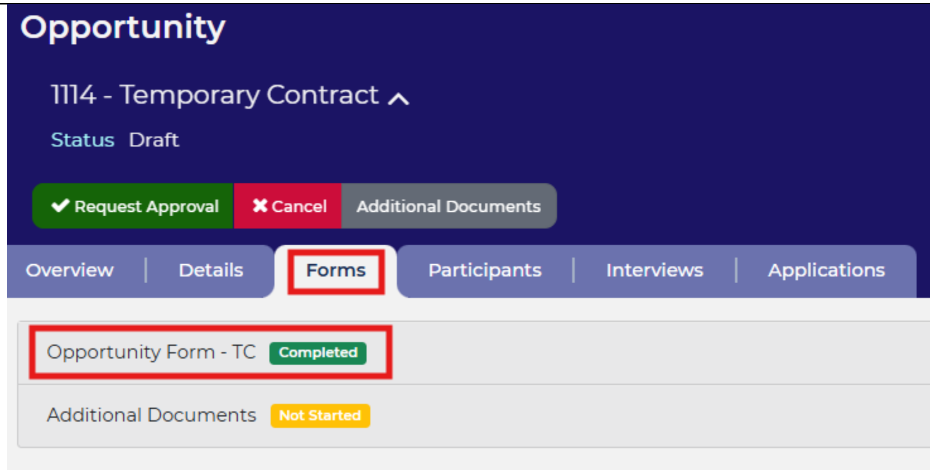
You will also receive an email to confirm that the Opportunity has been submitted for approval.

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 process. 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 relevant HR Recruitment or Operations Team to review and action.

Reviewing a request saved as "Draft" and releasing for approval

Step/Action	Example/Screenshot

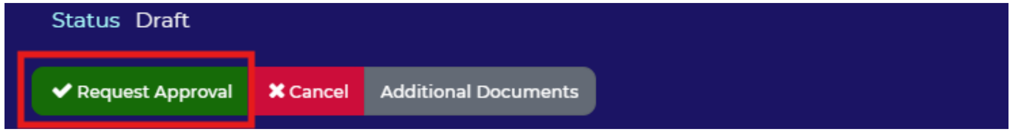
1) Locate your draft Opportunity by either:
   i. Using your **Dashboard**, scroll down on the "***TATF/TC/AW Requests***" tab to the "**Temporary Contract Requests**" widget and double click on the draft Opportunity you wish to review/edit.
   OR
   ii. In the left-hand menu, type in the Opportunity Title or ID, then click on the Opportunity in the results returned.

Tip: If you know the Opportunity ID, you can go straight to the Opportunity using the prefix "**v:**" followed by the ID. E.g. if the Opportunity ID is "*1115*" type "*v:1115*" in the search bar and press enter.

2) Once you are 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 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.



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To give others access to the Opportunity and Application, you will need to add them to the “Participants” tab.

On the Opportunity, under the “Participants” tab, select “Add Participant”.
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.
Tick “Can View Applications”.
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.
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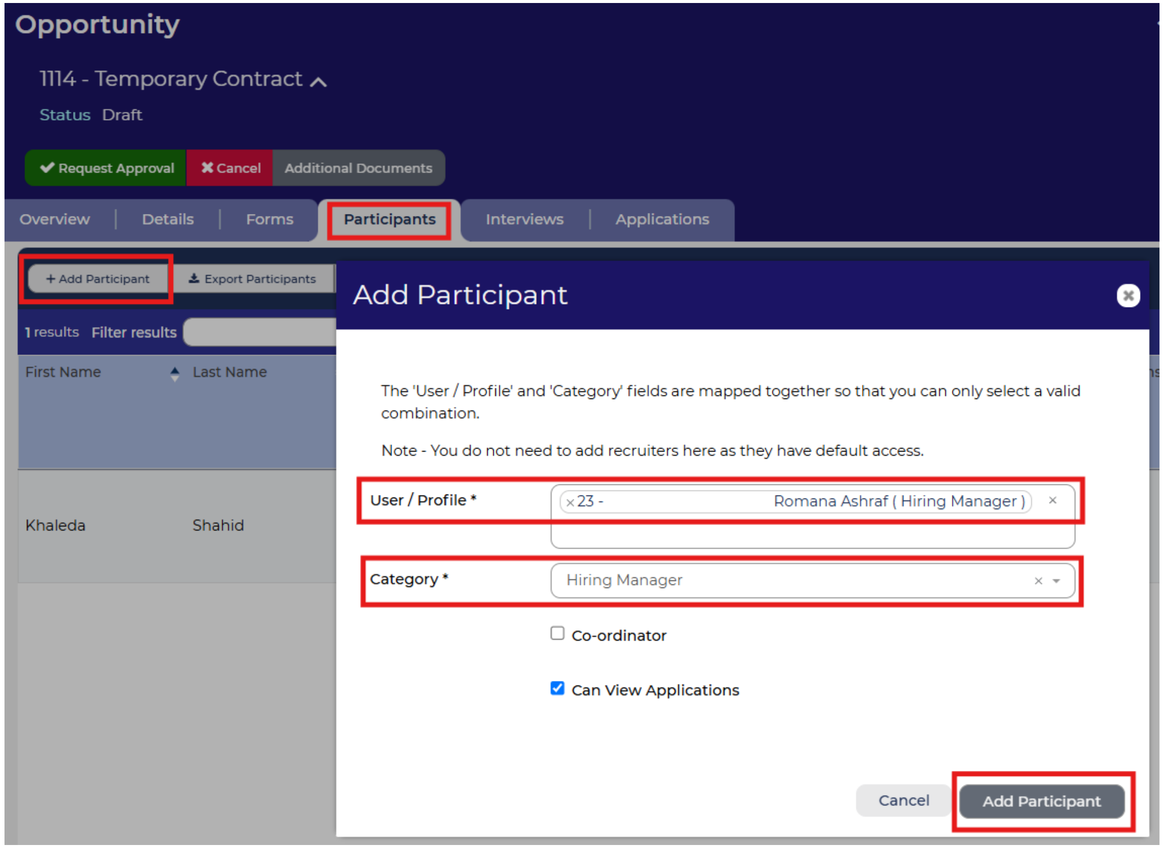

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