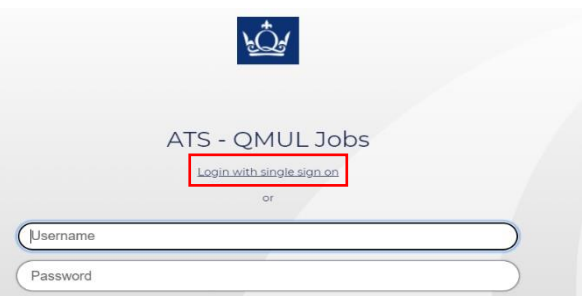


Raising and Managing a Contract Variation Request - Oleeo User Guide

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

- [Raise a contract variation request](#)
- [Activate a draft contract variation request](#)
- [Search for a contract variation request](#)
- [Re-submit a rejected contract variation request](#)
- [Delete a contract variation request raised in error](#)

Throughout this document, the terms application, employee and request are used interchangeably.

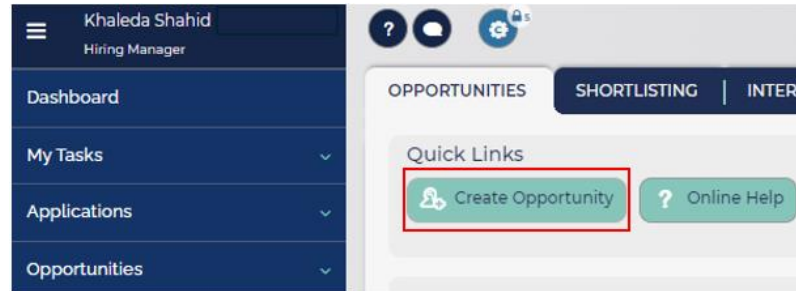
Accessing Oleeo	
Step/Action	Example/Screenshot
To access Oleeo, use this link: https://qmul-jobs.tal.net/ and click on “Log in with single sign on” to log into the system. (You are not required to enter any login details). Note: You must use the “Hiring Manager” profile to raise a Contract Variation Request. When you log into Oleeo, you will be presented with your homepage known as your Dashboard.	
Raising a Contract Variation Request	
You can raise a contract variation request (CVR) for the following scenarios: • Acting Up • Additional Responsibility • Additional Contract (for 6 months or less) • Change of Hours • Extension of Fixed term/Temporary Contract • Fixed term to Permanent Contract • Job Regrade / Promotion / Transfer / Demotion • Royalty Payments • Secondment	

1) Under your Hiring Manager profile, select “**Create Opportunity**”.

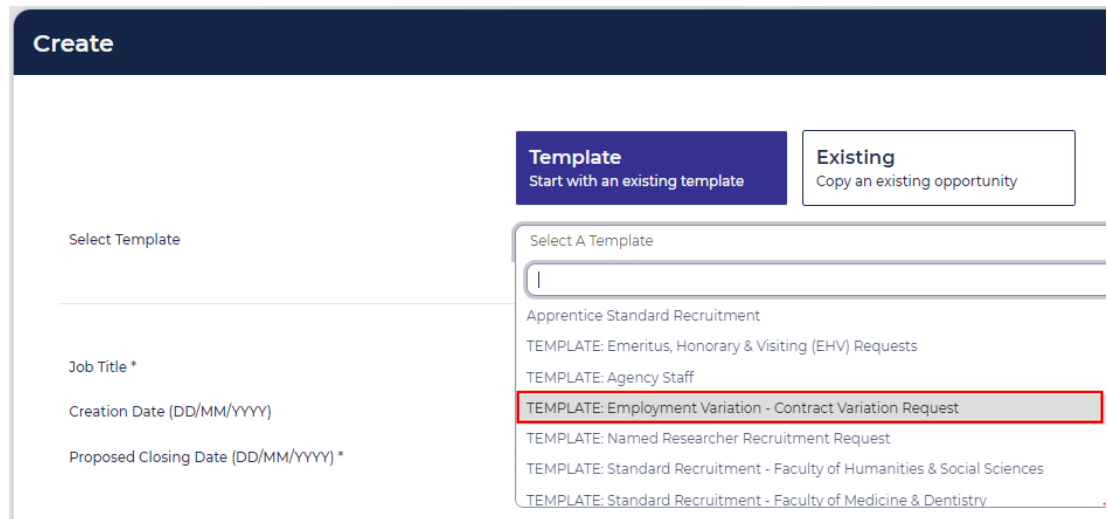
2) Select the “**Employment Variation - Contract Variation Request**” template from the drop-down menu.

3) Complete the Form.

- **Job Title:** Enter the initials of the employee followed by type of request being raised for the individual. For example, “JD - Contract Extension Request”.
- **Creation Date:** Leave this as it is.



The screenshot shows the top navigation bar with the user's name 'Khaleda Shahid' and role 'Hiring Manager'. Below this is a sidebar menu with options: Dashboard, My Tasks, Applications, and Opportunities. The main content area has tabs for OPPORTUNITIES, SHORTLISTING, and INTERVIEW. Under the OPPORTUNITIES tab, there is a 'Quick Links' section with two buttons: 'Create Opportunity' (highlighted with a red box) and 'Online Help'.



The screenshot shows the 'Create' form. On the right, there are two tabs: 'Template' (selected) and 'Existing'. Below the 'Template' tab, there is a dropdown menu labeled 'Select A Template'. The dropdown list includes several options, with 'TEMPLATE: Employment Variation - Contract Variation Request' highlighted in a red box. Other options include 'Apprentice Standard Recruitment', 'TEMPLATE: Emeritus, Honorary & Visiting (EHV) Requests', 'TEMPLATE: Agency Staff', 'TEMPLATE: Named Researcher Recruitment Request', 'TEMPLATE: Standard Recruitment - Faculty of Humanities & Social Sciences', and 'TEMPLATE: Standard Recruitment - Faculty of Medicine & Dentistry'.



The screenshot shows the form fields for 'Job Title *', 'Creation Date (DD/MM/YYYY)', and 'Proposed Closing Date (DD/MM/YYYY) *'. The 'Job Title' field contains the text 'JD - Contract Extension Request'. The 'Creation Date' field shows '29/05/2024' with a calendar icon. The 'Proposed Closing Date' field shows '31/08/2024' with a calendar icon. All three fields are highlighted with a red box.

- **Proposed Closing Date:** Input a date at least 3 months in the future.
 - **Funding Source:** Select as appropriate. This is a multi-select field and will determine who approves the request. If there is more than one source of funding, i.e. QM and Grant funding, you will need to obtain offline approval for the second source of funding from the appropriate approvers and attach it to the applicant page, under the **Forms** tab, **Flags Form**.
- 4) You can choose to click:
- **Save as Draft:** If you do not want to progress the request just yet. You can come back to this request later. See the “[Activating a Draft request](#)” section on how to take the request out of draft.
 - **Create:** To move forward with the request.
- 5) Select the green “**Activate**” button.

The opportunity status will now show as “**Active**”.

You have now created an **Opportunity** which acts only as a placeholder for you to create your contract variation request for the employee.

Please choose the funding source with care as this will determine the approvers. Once you have submitted your request this cannot be changed. For e.g., choosing 'Research grant' will send the request to School/Institute Manager (Tier 1) and JRMO (Tier 2), whilst choosing 'Queen Mary' will send the request to Finance (Tier 1) and FDO (Tier 2).

Funding Source * Queen Mary University (QM)

Cancel

Create

Save as Draft

Opportunity

457 - JD - Contract Extension Request ^

Status Draft

✓ Activate

Additional Documents

Overview

Details

Forms

Participants

Interviews

Applications

Summary

Current Status: Draft

457 - JD - Contract Extension Request ^

Status Active

Additional Documents

Overview

Details

Forms

Participants

Interviews

Applications

Summary

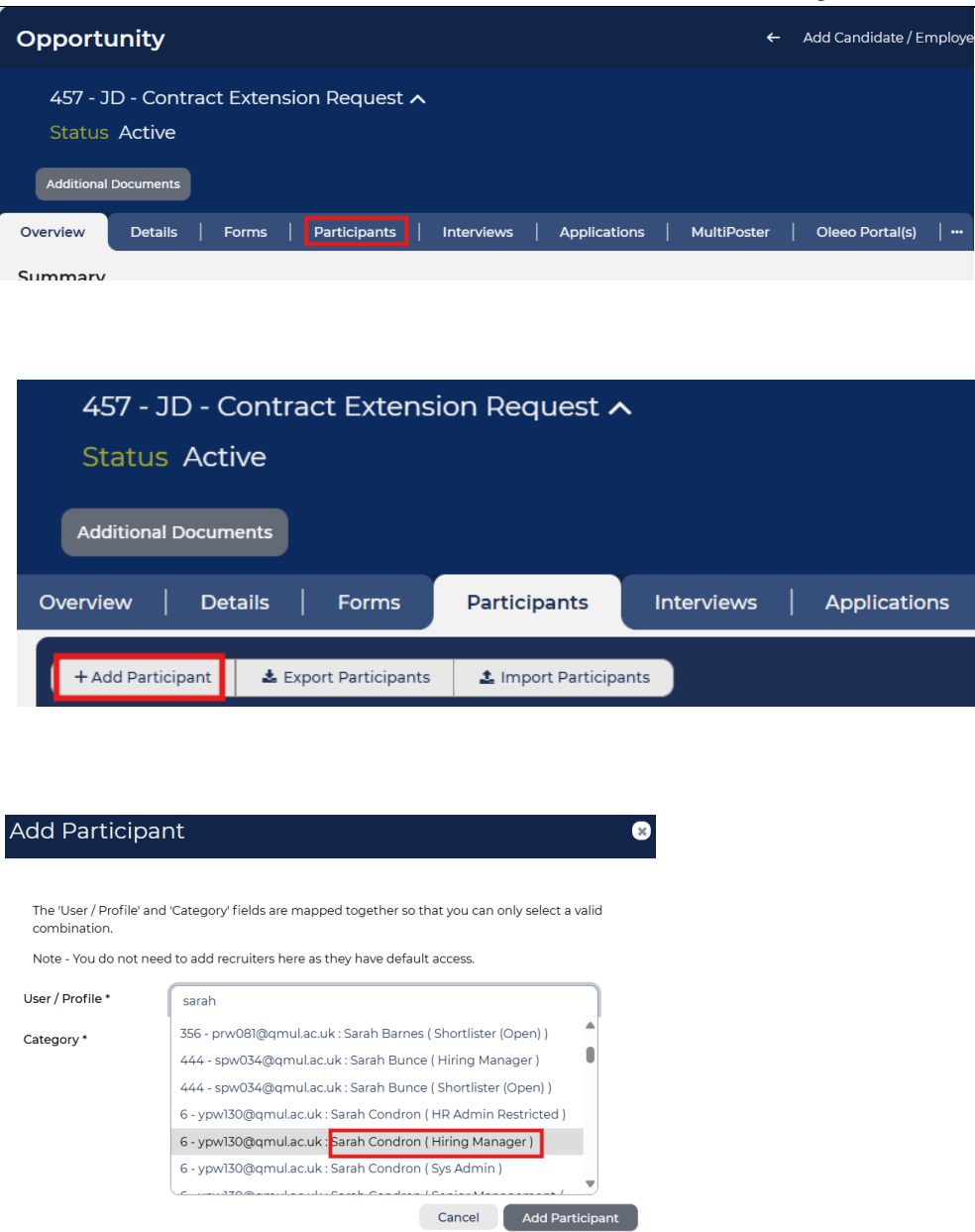
Current Status: Active

6) (Optional) If you wish to give another 'Hiring Manager' or administrator access to the request that you will be raising;

- Click on the 'Participants' tab.
- Click 'Add Participant'
- Search for the individual's name and choose the option that states '(Hiring Manager)' next to their name.
- Select **Hiring Manager** as the Category.
- Tick mark **Coordinator** and **Can View Applications**
- Click **Add Participant**.
- The added individual will be able to search for and view the request on their dashboard.

Please Note:

- The added participant will **not** be able to see the Contract Variation request on their dashboard unless you have also drafted/submitted the Request form itself (shown in the steps below).
- The added participant will **not** receive any email notifications for the Opportunity that they have been manually added to as a Participant.



The screenshot shows the 'Opportunity' page for '457 - JD - Contract Extension Request' with status 'Active'. The 'Participants' tab is selected in the top navigation bar. Below the tabs, there is a '+ Add Participant' button, 'Export Participants', and 'Import Participants' buttons. A modal window titled 'Add Participant' is open, showing a list of users. The user 'Sarah Condon (Hiring Manager)' is selected, and the 'Add Participant' button is highlighted.

Opportunity ← Add Candidate / Employee

457 - JD - Contract Extension Request ^

Status Active

Additional Documents

Overview | Details | Forms | **Participants** | Interviews | Applications | MultiPoster | Oleo Portal(s) | ...

Summary

457 - JD - Contract Extension Request ^

Status Active

Additional Documents

Overview | Details | Forms | **Participants** | Interviews | Applications

+ Add Participant | Export Participants | Import Participants

Add Participant [X]

The 'User / Profile' and 'Category' fields are mapped together so that you can only select a valid combination.

Note - You do not need to add recruiters here as they have default access.

User / Profile *

Category *

sarah

356 - prw081@qmul.ac.uk : Sarah Barnes (Shortlister (Open))

444 - spw034@qmul.ac.uk : Sarah Bunce (Hiring Manager)

444 - spw034@qmul.ac.uk : Sarah Bunce (Shortlister (Open))

6 - ypw130@qmul.ac.uk : Sarah Condon (HR Admin Restricted)

6 - ypw130@qmul.ac.uk : **Sarah Condon (Hiring Manager)**

6 - ypw130@qmul.ac.uk : Sarah Condon (Sys Admin)

Cancel | Add Participant

Add Participant

The 'User / Profile' and 'Category' fields are mapped together so that you can only select a valid combination.

Note - You do not need to add recruiters here as they have default access.

User / Profile *

Category *

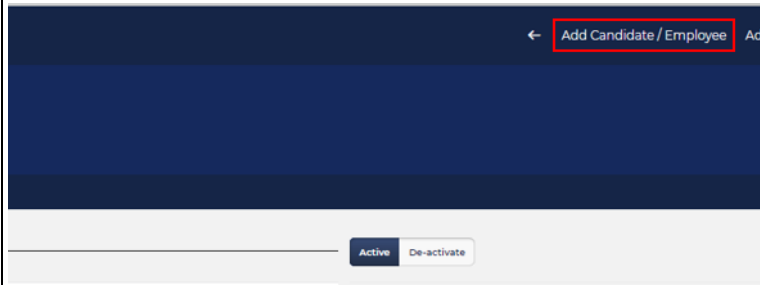
☒ Co-ordinator

☒ Can View Applications

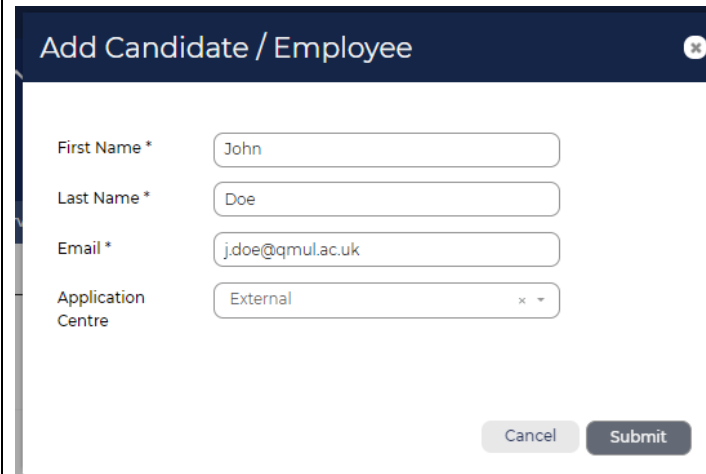
Cancel **Add Participant**

+ Add Participant Export Participants Import Participants						
3 results Filter results						
FIRST NAME	LAST NAME	USERNAME	ROLE	CO-ORDINATOR	VIEW APPLICATIONS	
Sarah	Condrón	ypw130@qmul.ac.uk	Hiring Manager	✓	✓	Edit Remove
Asma	Husain	ypw430@qmul.ac.uk	HR Admin	✗	✓	Edit Remove
Khaleda	Shahid	aaw734@qmul.ac.uk	Hiring Manager	✗	✓	Edit Remove

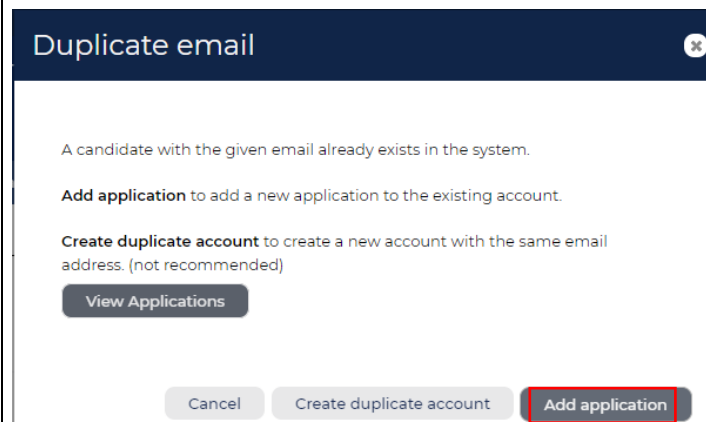
7) Click “**Add Candidate / Employee**” at the top right corner.



8) Enter the **First Name**, **Last Name** and **Email Address** of the employee you are making the request for and click “**Submit**”.



9) If multiple applications have been submitted previously for the employee, the system will present a warning. Continue by clicking “**Add Application**”.



Now you are ready to complete the contract variation request (CVR) form.

10) Click “[Request Form](#)”, complete the form and click “[Submit](#)”.

There is no option to save the request form as a draft.

Tip: In the form, select the **Reason** for the CVR and take note of what is required. If you do not have everything to hand, take note of the **Applicant ID** (in this case 2299) to return to and complete the request form once you have all the details and documents to hand.

Please Note:

- i. **Hiring Manager** on the request form is the name of the individual raising and managing the CVR on Oleo. They will receive information about the status of the request and any action that needs to be taken.
- ii. Once you have submitted the form, no edits can be made and will **NOT** show for the Approvers.

11) Upon submission of the form, the application status will change to “[EV - Awaiting Tier 1 Approval](#)”.




The form will now go through the standard two-tier approval process. You will receive a notification when the request is approved at final tier and after the HR Operations Team have completed the process at their end.

Once approved and with the HR Operations Team, the relevant paperwork will be drawn up and sent to the employee as required via email.

Activating a “Draft” request

If you have clicked “[Save as Draft](#)”, you will see this screen which means you have successfully saved the draft.

This screen informs you of the

[Opportunity ID](#)

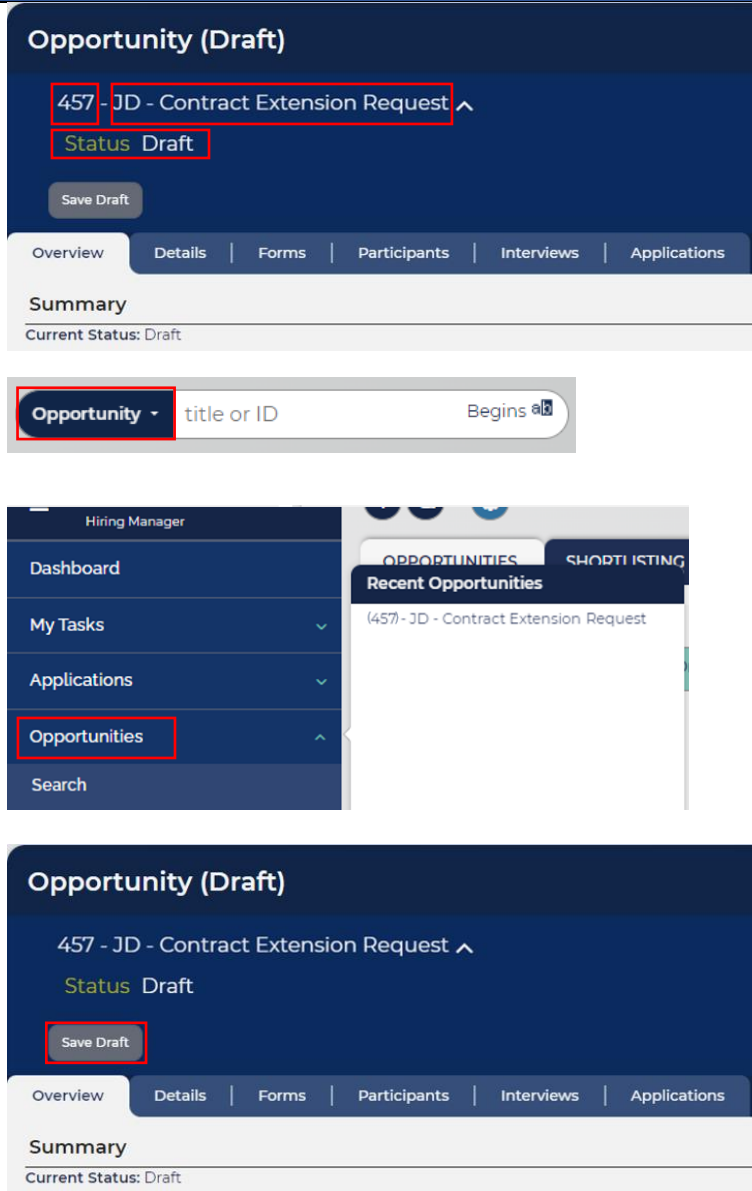
[Opportunity Title](#)

[Opportunity Status](#)

You can search for the saved draft opportunity using the search function at the top right of your screen, entering the “**Opportunity Title**” or “**Opportunity Number/ID**”. Ensure the search parameter is set to “[Opportunity](#)”.

You can also find the saved request by clicking “[Opportunities](#)” within the left-hand pane. A recent list of Opportunities will come up for you to choose from.

1a) On your draft opportunity, if you are ready for the next step, select the grey “[Save Draft](#)” button. Then follow on from [step 5](#) above to activate the post and submit the request.



Opportunity (Draft)

457 - JD - Contract Extension Request ^

Status Draft

Save Draft

Overview | Details | Forms | Participants | Interviews | Applications

Summary

Current Status: Draft

Opportunity - title or ID Begins at

Hiring Manager

Dashboard

My Tasks

Applications

Opportunities

Search

Recent Opportunities

(457) - JD - Contract Extension Request

Opportunity (Draft)

457 - JD - Contract Extension Request ^

Status Draft

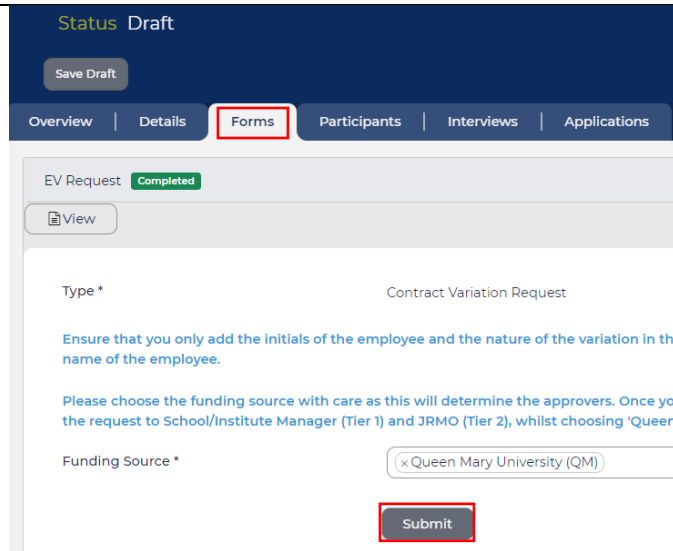
Save Draft

Overview | Details | Forms | Participants | Interviews | Applications

Summary

Current Status: Draft

1b) If you need to update the opportunity form, go to the **Forms** tab, select “**EV Request**” to open the form, update what you need and then select “**Submit**” to save the changes.



Status Draft

Save Draft

Overview | Details | **Forms** | Participants | Interviews | Applications

EV Request **Completed**

View

Type * Contract Variation Request

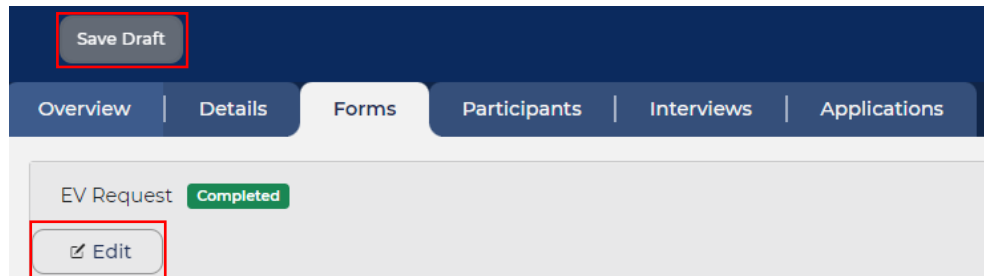
Ensure that you only add the initials of the employee and the nature of the variation in the name of the employee.

Please choose the funding source with care as this will determine the approvers. Once you the request to School/Institute Manager (Tier 1) and JRMO (Tier 2), whilst choosing 'Queen

Funding Source *

Submit

1bi) If you need to edit the form again, select “**Edit**”.



Save Draft

Overview | Details | **Forms** | Participants | Interviews | Applications

EV Request **Completed**

Edit

1bii) Once you are happy with the form, select the grey “**Save Draft**” button. Then follow on from [step 5](#) above to activate the post and submit the request.

Searching for a CVR

For the purposes of CVRs, the opportunities you create ([shown earlier in this document](#)) and their **Opportunity ID** (475 in the example above) are irrelevant. It merely acts as a placeholder for the CVR. The **Application ID** (2299 in the example on [page 5](#)) is what you need to make note of when referring to CVR forms.

Method 1: Use the search box on the top right of your dashboard ensuring the search parameter is set to “**Application**”.

Method 2: If you happen to search for the opportunity first and land on the opportunity page,

- Navigate to the applications tab.
- Select the number in the table which will take you to the list of applications associated to the opportunity (there should only be one for CVRs).

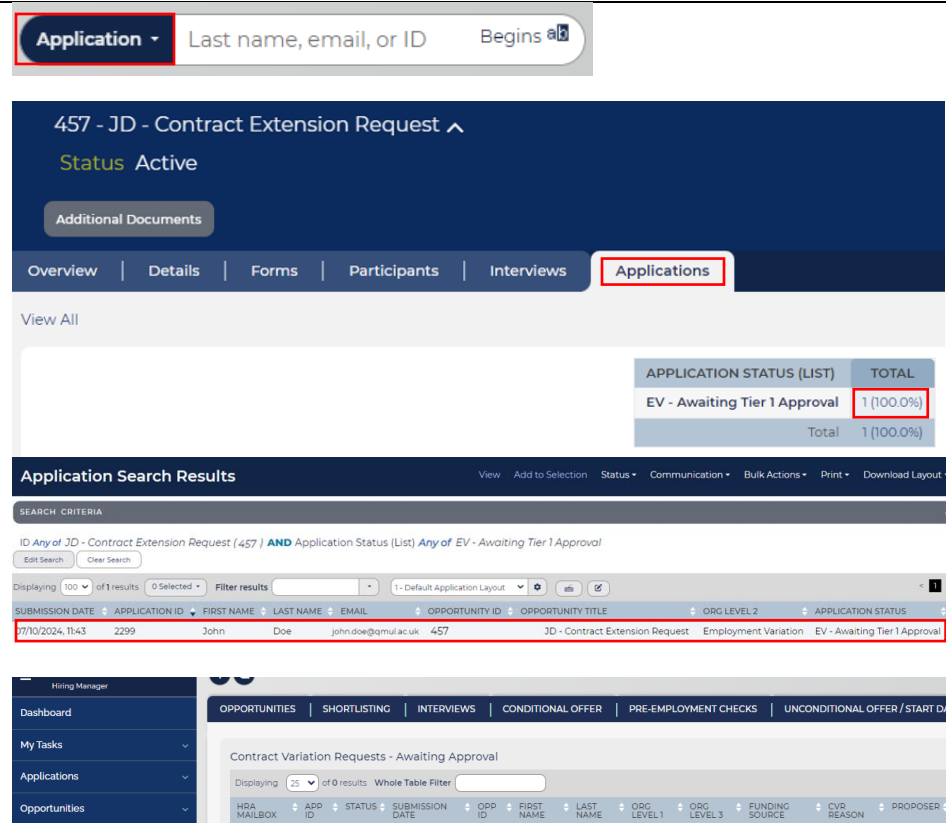
- Double click on the name of the individual you wish to view the request for. You will then land on the application page.

Method 3:

- Navigate to the “**Employment Variations**” tab on your dashboard.

You will be presented with boxes containing requests that are:

- Awaiting Approval.
- With HR Admin to Review.
- In Draft.
- Have been Processed.
- Have been Rejected.



The screenshot shows the HR system interface. At the top, a search bar is set to "Application" with the placeholder text "Last name, email, or ID". Below this, the "457 - JD - Contract Extension Request" page is shown, with the status "Active". The "Applications" tab is selected in the navigation bar. A table shows the application status: "EV - Awaiting Tier 1 Approval" with a count of 1 (100.0%).

Below the table, the "Application Search Results" section is visible. It shows a search criteria bar with "ID Any of JD - Contract Extension Request (457) AND Application Status (List) Any of EV - Awaiting Tier 1 Approval". The search results table is displayed, showing one result:

SUBMISSION DATE	APPLICATION ID	FIRST NAME	LAST NAME	EMAIL	OPPORTUNITY ID	OPPORTUNITY TITLE	ORG LEVEL 2	APPLICATION STATUS
27/10/2024, 11:43	2299	John	Doe	john.doe@qmul.ac.uk	457	JD - Contract Extension Request	Employment Variation	EV - Awaiting Tier 1 Approval

At the bottom, the "Employment Variations" tab is selected in the navigation bar. The "Contract Variation Requests - Awaiting Approval" section is shown, displaying a table with columns: HDA MAILBOX, APP ID, STATUS, SUBMISSION DATE, OPP ID, FIRST NAME, LAST NAME, ORG LEVEL 1, ORG LEVEL 3, FUNDING SOURCE, CVR REASON, PROPOSER, PROPOSED DATE OF CHANGE, and TIER 1 APPROVER.

b) Double click on the CVR you wish to view.

Re-submitting a rejected request

When a contract variation request is rejected, you will receive an email to inform you of the reason.

- 1) Search for the request using one of the methods [above](#).
- 2) Once on the applicant (employee) page, click the green “**Update**” button. This will launch the CVR form.
- 3) Make the necessary edits/updates to the form and then click “**Submit**”.
- 4) Upon submission, the status will change to “**EV - Awaiting Tier 1 Approval**”.



The screenshot shows the 'Application Summary' page for a request titled '2299 - John Doe ^'. Below the title, it says 'JD - Contract Extension Request'. The status is 'EV - Not Approved' with a green checkmark icon, and it was 'Applied' on '7 October 2024 at 11:43:09 BST'. There is a green 'Update' button with a checkmark icon. At the bottom, there are tabs for 'Summary', 'Notes', 'Forms (3)', 'Access', and 'CVR Form', with the 'CVR Form' tab highlighted.

Deleting a request created in error

You will need to contact the [HR Operations team](#) to delete the request for you.