

OLEEO – LINE MANAGER USER GUIDE

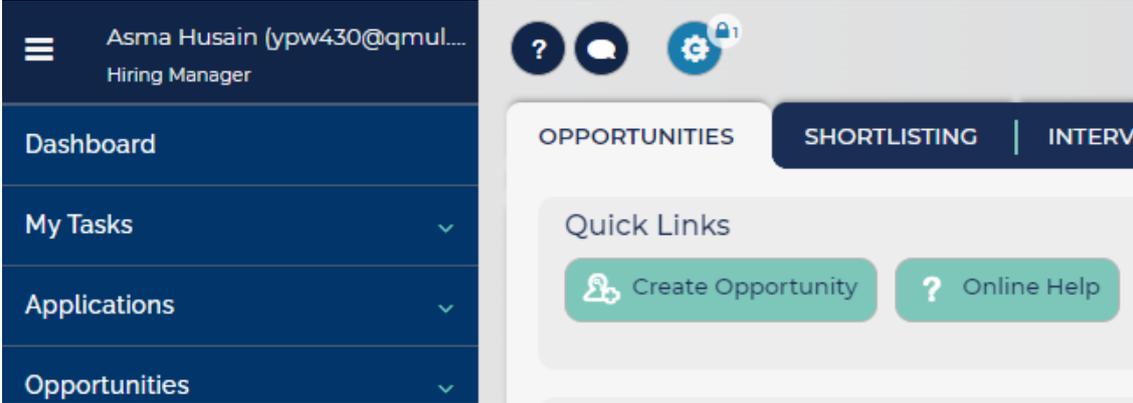
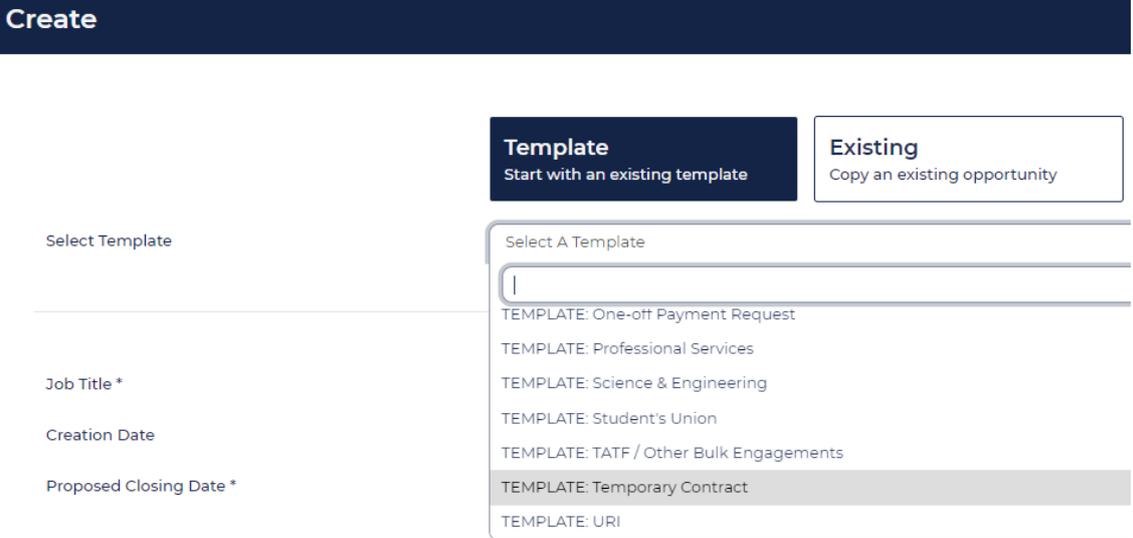
GUIDE SUBMITTING A TEMPORARY CONTRACT REQUEST FORM

This guide will show you how to submit a request for a new temporary contract for new starters/re-joiners & additional contracts for current employees. These contracts include;

1. Temporary part-year Contracts (set hours)
2. Temporary Timesheet Contracts

Please note that you should not use this form to request a contract variation for an existing temporary contract employee. Use the ‘Contract Variation request’ template for these types of requests.

Use the ‘TATF / Other Bulk Engagements’ request template to submit all types of requests for TATFs and bulk engagements (i.e. Demonstrators/Student Ambassadors/Invigilators/SU casuals/CBME Tutors etc).

| STEP | EXAMPLE |
|--|---|
| Log into Oleeo. | LINK |
| Click ‘ Create Opportunity ’ from the ‘Quick Links’ menu |  <p>The screenshot shows a user interface for a hiring manager. On the left is a dark blue sidebar menu with options: Dashboard, My Tasks, Applications, and Opportunities. The main content area has a top navigation bar with 'OPPORTUNITIES', 'SHORTLISTING', and 'INTERVIEW'. Below this is a 'Quick Links' section with two buttons: 'Create Opportunity' (with a person icon) and 'Online Help' (with a question mark icon).</p> |
| Select ‘ Temporary Contract ’ from the drop-down menu. Note: Do not click on the ‘ Existing ’ tile unless you want to use a previously-submitted request as a carbon copy template for your current request. |  <p>The screenshot shows the 'Create' form. At the top, there are two tabs: 'Template' (selected) and 'Existing'. Below the tabs are several input fields: 'Select Template', 'Job Title *', 'Creation Date', and 'Proposed Closing Date *'. A dropdown menu is open under 'Select Template', showing a list of templates. The 'TEMPLATE: Temporary Contract' option is highlighted in grey.</p> |

Under **'Job Title'** write the name of the individual and contract type.

Put a future date that is at least 3 months ahead in the **'Proposed Closing Date'** field.

(Note: this field has no bearing on this process. However, the date needs to be in the future.)

Select Template TEMPLATE: Temporary Contract

Job Title * John Doe - Temp Part-Year Contract

Creation Date 07/12/2023  16 35

Proposed Closing Date * 31/03/2024  23 55

Complete the form that comes up. Add any notes/comments if needed. Attach all required documentation (like business case, risk assessment, right to work documents, Personal details form)

Click **'Create'** when you are ready to submit the form.

Please note that once you have submitted a form, any new document uploads or form edits will **NOT** show for the approver.

Click **'Cancel'** to quit without saving any information.

Click **'Save as Draft'** if you have started but don't have all the information to hand and want to save your progress. You can then return and complete the required fields later.

Click 'Cancel' to quit without saving any information | Click 'Create' if you're happy the form contains all the required information | Click 'Save as Draft' if you've started but don't have all the information to hand and want to save your progress. You can then return and complete the required fields later.

Cancel Create Save as Draft

Bringing a **'Save as Draft'** form back to **'Live'**.

If you have clicked 'Save as Draft' you will see the screen shown opposite.

You will need to click 'Save Draft' to bring the form out of its draft stage and continue with the form.

If you have logged out and then logged back in, then search for the 'Opportunity ID' ('457' as shown in the screen opposite) using the Search function at the top right. Make sure to change the search parameter to 'Opportunity'.

Then click on 'Save Draft'.

Opportunity (Draft)

457 - John Doe - Contract extension Request

Status Draft

Save Draft

Overview | Details | Forms | Participants | Interviews | Applications

Summary

Current Status: Draft

Opportunity 457 Begins

You can also find the saved request by clicking 'Opportunities' in the left-hand pane. A recent list of Opportunities comes up for you to choose from.

Dashboard

My Tasks

Applications

Candidates

Opportunities

Search

Selections

Create

Templates

List Opportunities

Recent Opportunities

- John Doe - Contract extension Request
- John Doe - Contract Extension Request
- D552 Test
- John Doe - Acting Up Allowance
- UAT - TS-03
- jhgj
- rgrr
- eeg
- D541 Test
- treway

notification test

If you have clicked 'Create', then you will see the screen shown opposite.

Note that the status is still showing as 'Draft'.

Click 'Request Approval' to start the process.

Opportunity

513 - John Doe - Temp Part-Year Contract

Status Draft

Request Approval Cancel

Overview | Details | Forms | Participants | Interviews | Applications

Summary

Current Status: Draft

You will now notice the status change to 'Awaiting Approval - Tier 1'.

Opportunity

513 - John Doe - Temp Part-Year Contract
Status Awaiting Approval - Tier 1

Overview | Details | Forms | Participants | Interviews | Applications

Summary

Current Status: Awaiting Approval - Tier 1

The form will then go through the standard two-step approval process. You will receive a notification when the request is approved at final tier.

If the Request is approved, the relevant paperwork will be drawn-up and sent to the employee by the HR Recruitment or HR Operations Team, as applicable.

FREQUENTLY ASKED QUESTIONS

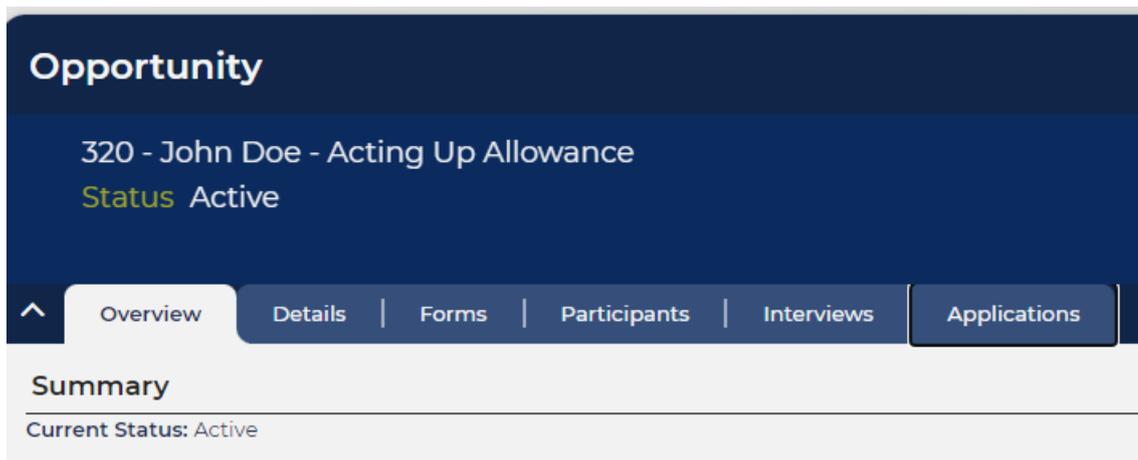
1. What is the difference between an Opp ID and an App ID?

For purposes of Contract Variation requests, please note that the 'Opportunity ID' (457 in above example) is not relevant. It merely acts as a placeholder for your Variation request. The App ID ('1511 in the above example') is what you need to make note of when referring to Contract Variation request forms.

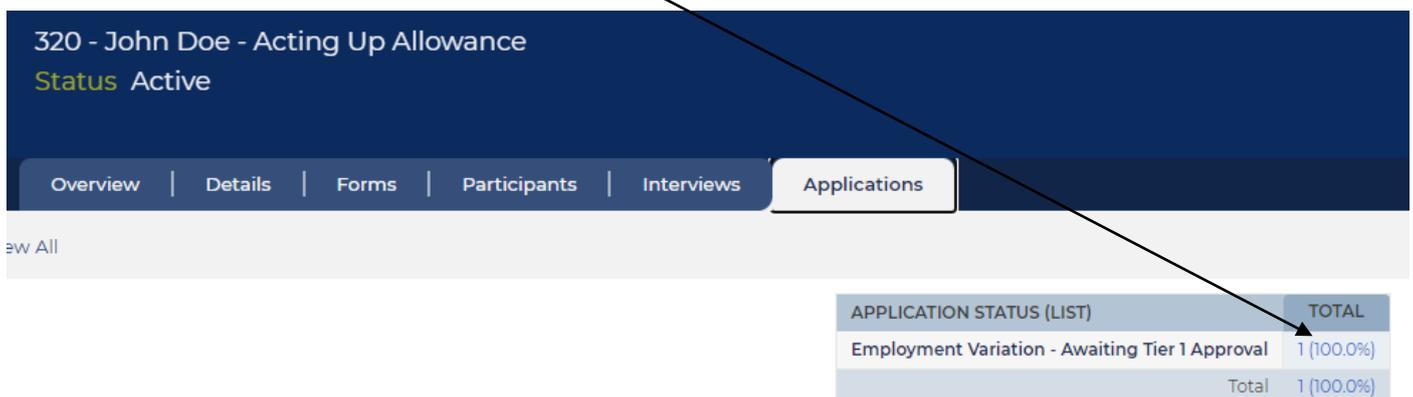
When using the search function to look for a Contract Variation request form, ensure that you choose the 'Application' parameter.

2. How do I return to the CVR form if I accidentally land on the 'Opportunity' page for a CVR?

- This what the screen would look like if you accidentally land on an Opportunity page for a CVR (note that the Status of Opportunities for all submitted CVR's will say 'Active');



- In order to see the Contract variation request form, click the 'Applications' tab and then the Employment Variation in the table in blue;



- Double click on the Application displaying in the list that comes up (there should always only be one for CVRs);

| SUBMISSION DATE | APPLICATION ID | FIRST NAME | LAST NAME | EMAIL | OPPORTUNITY TITLE | ORG LEVEL 1 | APPLICATION STATUS |
|-------------------|----------------|------------|-----------|---------------------|--------------------------------|----------------------|---|
| 25/09/2023, 11:45 | 1390 | John | Doe | john.doe@qmul.ac.uk | John Doe - Acting Up Allowance | Employment Variation | Employment Variation - Awaiting Tier 1 Approval |

- You will land on the page for the CVR form;

Application Summary

1390 - John Doe

John Doe - Acting Up Allowance

Status Employment Variation - Awaiting Tier 1 Approval

Summary | Notes | Forms (1) | Access

Application Summary

Email john.doe@qmul.ac.uk

3. How do I delete a request that was created in error?

You will need to get in touch with your [HR Operations team](#) to request that they delete the form for you.

4. My request had been rejected. How do I update and re-submit the form?

- Search for the request via the Search function at the top right using the App ID. **OR** click 'Applications' in the left-hand pane and then 'Search'. This will bring up a list of all of your submitted requests. Double click the one that you need to re-submit.
- Click the green 'update' button on the form that comes up.
- Make the necessary edits/updates to the form and click 'Submit'.
- The form will now show as being at Tier 1 Approval.