

Named Researcher Recruitment Request - Hiring Manager Oleeo User

Guide

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

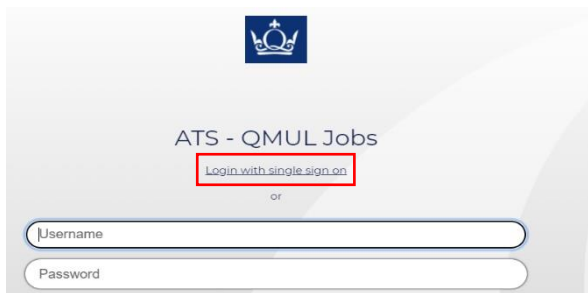
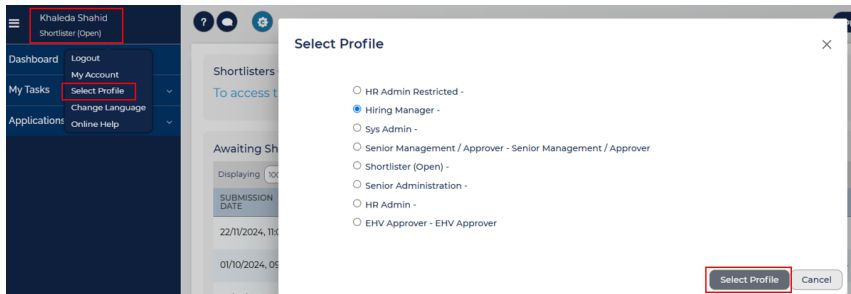
- [Create a Named Researcher Opportunity/Vacancy including copying Vacancies](#)
- [View, amend and release for approval a Named Researcher Vacancy saved as “Draft”](#)
- [Create an offer for a Named Researcher](#) and [attach additional documents to an application page](#)
- [Give other users access to an Opportunity](#)

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

IMPORTANT NOTE: Please note that 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.

Where a post is not being advertised for any other reason (outside of the Named Researcher route) please raise a Standard Recruitment request, and select 'no advertising' and attach the relevant approval that confirms no advertising is required.

The Opportunity will be returned to the Hiring Manager if it is incorrectly categorised as a Named Researcher.

Accessing Oleeo	
Step/Action	Example/Screenshot
To access Oleeo, use this link: https://qmul-jobs.tal.net/vx/saml2 and click on “Log in with single sign on” to log into the system. Note: You must be logged in with a “Hiring Manager” profile to be able to create an Opportunity. When you log into Oleeo, you will be presented with your homepage known as your Dashboard. If you happen to be on a profile other than the Hiring Manager profile, to switch the profile you are on: - Select your name in the top left of your dashboard. - Click “Select Profile” in the drop down menu. - Tick “Hiring Manager”. - Click the “Select Profile” button.	 

Creating a vacancy

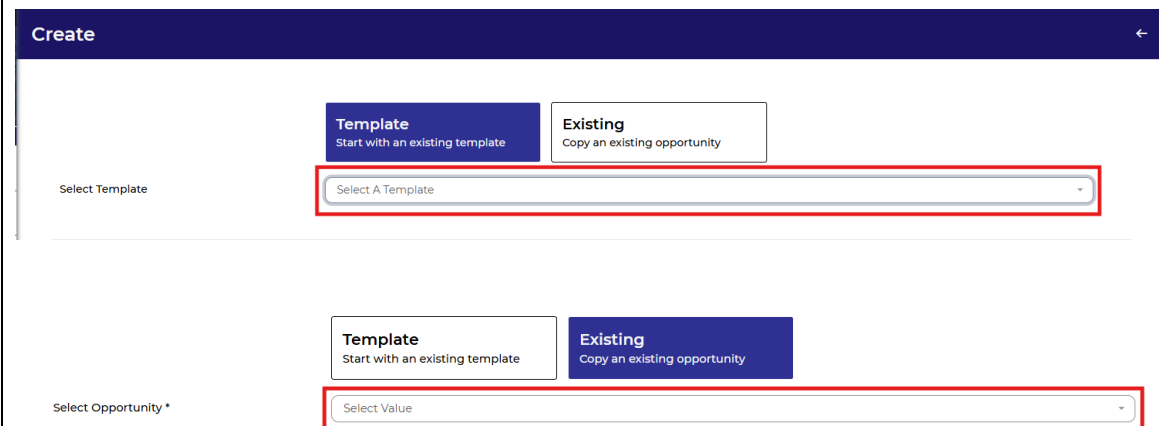
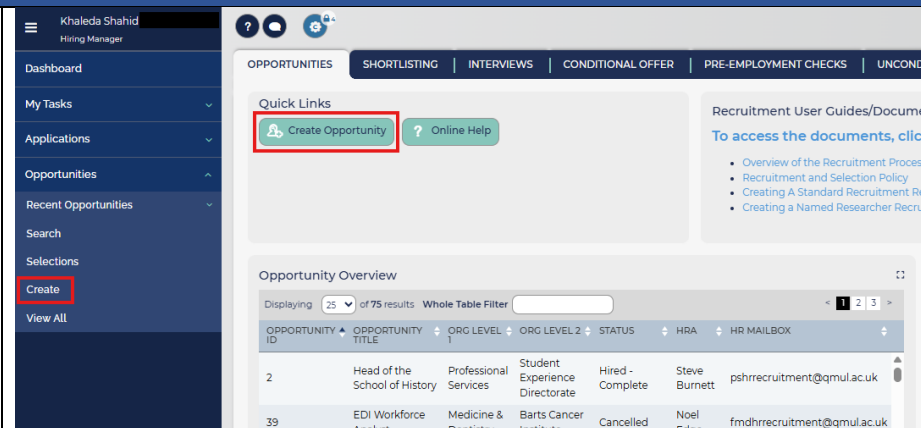
- 1) Select the “**Create Opportunity**” button in the “**Quick Links**” box on your Dashboard which will load the “**Create**” screen.

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

- 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 template you wish to use. 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**” 3 months after the creation date.
“**Creation Date**” is auto populated and should be left as is.

- 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;
 - a) the individual’s name (FIRST NAME, SURNAME), typically captured within the Staff and Investigator DI costs section of the grant award letter or;
 - b) a confirmation letter from the Grant Award Body detailing the named researcher status of the individual against the specific award.

Job Title *

Creation Date (DD/MM/YYYY)

02/04/2025

14

40

Proposed Closing Date (DD/MM/YYYY) *

DD/MM/YYYY

23

55

Position Details

Budget Code *

Organisation Level 1 *

Organisation Level 2 *

Organisation Level 3 *

Career Family *

Planned Number of Hires (FTE) *

This refers to the number of Full Time Equivalent (FTE) appointments you wish to recruit to for this vacancy. For example, if the new employee is scheduled to work full time, they represent 1 FTE. If the new employee is scheduled to work 2 days per week, they represent 0.4 FTE.

Contract Type *

Will this position be term time only? *

Target Start Date *

DD/MM/YYYY

Reason for Recruitment Request *

Please provide specific and detailed information on the requirement for this request and the impact on service needs if the request is rejected

Additional information for Recruitment Request *

Job Pack & Attachments

Job Pack Attachment (Internal) *

Evidence of Grant Agreement *

Supplementary Material 1

Supplementary Material 2

Supplementary Material 3

- **Supplementary Material:** You can attach supplementary material here. Documents must be uploaded in PDF format.
- 6) Complete the **Pre-employment Checks** section. This includes indicating whether a DBS, Professional Registration and or Qualifications are required in addition to the mandatory 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 notifications from Oleo about the position.
 - 9) 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 10.
 - 10) The Opportunity ID, Title and Status will be presented. 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.

Pre-employment Checks

In addition to the mandatory pre-employment checks (Right to Work, References and Occupational Health checks) please indicate if the following checks are also required for this position.

Disclosure Barring Service (DBS) Check * Select

To determine the appropriate level of DBS clearance for this role please ensure you use the [online eligibility tool](#).

Is a Professional Registration required for this role? * Select

Essential Qualifications Required? * Select

Please note, if no essential qualifications are required, the successful candidate will not be requested to upload evidence of qualifications at offer stage.

Sponsorship Information

Please note, you may receive applications and questions from prospective applicants who may require sponsorship for a visa in order to take up the post. Do check with the [HR Immigration Team](#) for confirmation if this role is eligible for sponsorship, prior to advertising. For more information refer to the [Human Resources website](#).

Named Researcher Details

Full Name *

CV * Choose file No file chosen

Key Leads

Hiring Manager * Select Value

Cancel Create Save as Draft

Opportunity

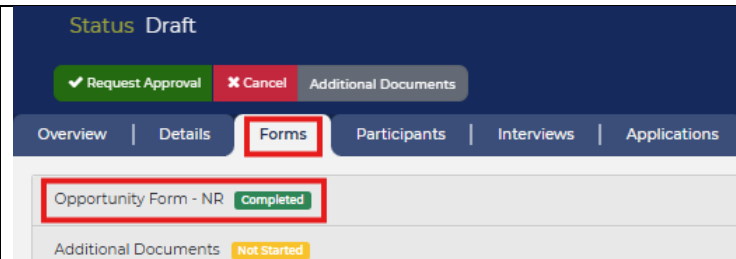
1112 - Named Researcher ^

Status Draft

✓ Request Approval ✗ Cancel Additional Documents

Overview | Details | Forms | Participants | Interviews | Applications

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**”.



The screenshot shows the Oleeo system interface. At the top, there is a 'Status Draft' header. Below it, there are three buttons: 'Request Approval' (green with a checkmark), 'Cancel' (red with an X), and 'Additional Documents' (grey). A navigation bar contains tabs: 'Overview', 'Details', 'Forms' (highlighted with a red box), 'Participants', 'Interviews', and 'Applications'. Below the navigation bar, there is a table of forms. The first row is 'Opportunity Form - NR' with a 'Completed' status (green box). The second row is 'Additional Documents' with a 'Not Started' status (yellow box).

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

- **Research Grant funded** requests will be sent to the School/Institute Manager (Tier 1) and then JRMO (Tier 2),
- **Queen Mary funded** requests will be sent to Finance (Tier 1) and then FDO (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 below guidance on creating an offer.

How to create an offer

Step/Action

- 1) Access the Application page.
 - a. Click on the “Oleeo” link in the email notification you receive to take you directly to the Application and proceed to step 2.
 - b. Otherwise, you can use the search bar on the top right of your Dashboard ensuring the search parameter is set to “Application” and enter the Application ID. **Or** 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 prepopulate according to the original request. **It is important you double-check that these details are correct.**

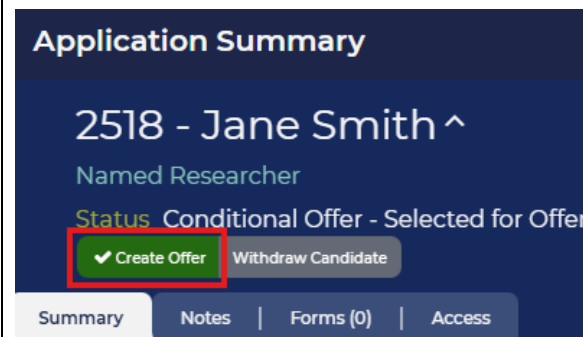
- 4) After completing the form, click “[Submit](#)”.

Upon submission of the form, the application status will change to “[Conditional Offer - HR Admin Review](#)”.

Examples/Screenshots



STATUS	APPLICATION ID	FIRST NAME	LAST NAME	OPPORTUNITY TITLE	ORG LEVEL 3	DAYS AWAITING	RECRUITMENT ADMIN	RECRUITMENT MAILBOX
Conditional Offer - Selected for Offer	2518	Jane	Smith	Named Researcher	HRST System Testing (DO NOT USE)	0	Khaleda Shahid	hr-recruitment@qmul.ac.uk
Conditional Offer - Selected for Offer	2411	Jack	Smith	Interview Manager	HRST System Testing (DO NOT USE)	7	Khaleda Shahid	hr-recruitment@qmul.ac.uk
Conditional Offer - Selected for Offer	2405	Brother	Dawn	Reference Template Testing	HRST System Testing (DO NOT USE)	130	Khaleda Shahid	hr-recruitment@qmul.ac.uk



Application Summary

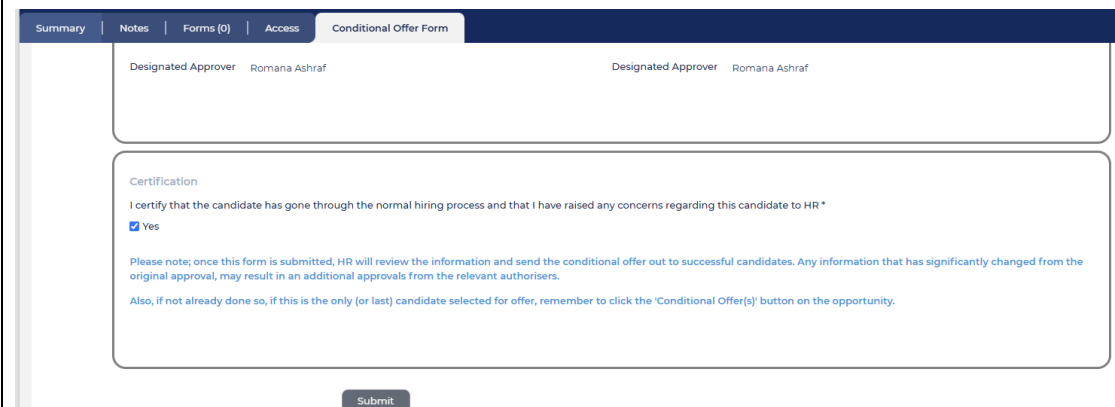
2518 - Jane Smith ^

Named Researcher

Status: Conditional Offer - Selected for Offer

[✓ Create Offer](#) [Withdraw Candidate](#)

Summary | Notes | Forms (0) | Access



Summary | Notes | Forms (0) | Access | **Conditional Offer Form**

Designated Approver: Romana Ashraf

Designated Approver: Romana Ashraf

Certification

I certify that the candidate has gone through the normal hiring process and that I have raised any concerns regarding this candidate to HR *

☒ Yes

Please note: once this form is submitted, HR will review the information and send the conditional offer out to successful candidates. Any information that has significantly changed from the original approval, may result in an additional approvals from the relevant authorisers.

Also, if not already done so, if this is the only (or last) candidate selected for offer, remember to click the 'Conditional Offer(s)' button on the opportunity.

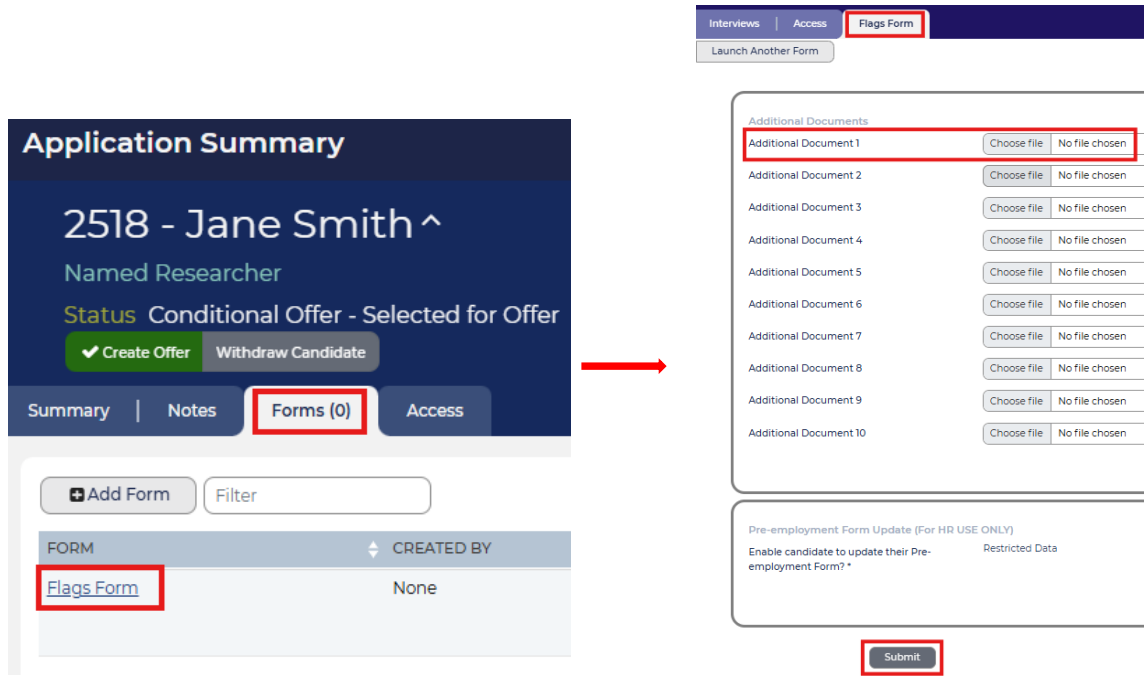
[Submit](#)

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.

Note: If the Offer differs from the original Opportunity request in Organisation Level 1, Grade/Pay Group, an increase in FTE or an increase in working hours, 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.

Once the applicant has accepted their Conditional Offer, the individual will go through the same pre-employment checks process as standard recruitment including the requirement of obtaining two references. Candidates 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 Oleo.

How to attach documents to an Applicant's page

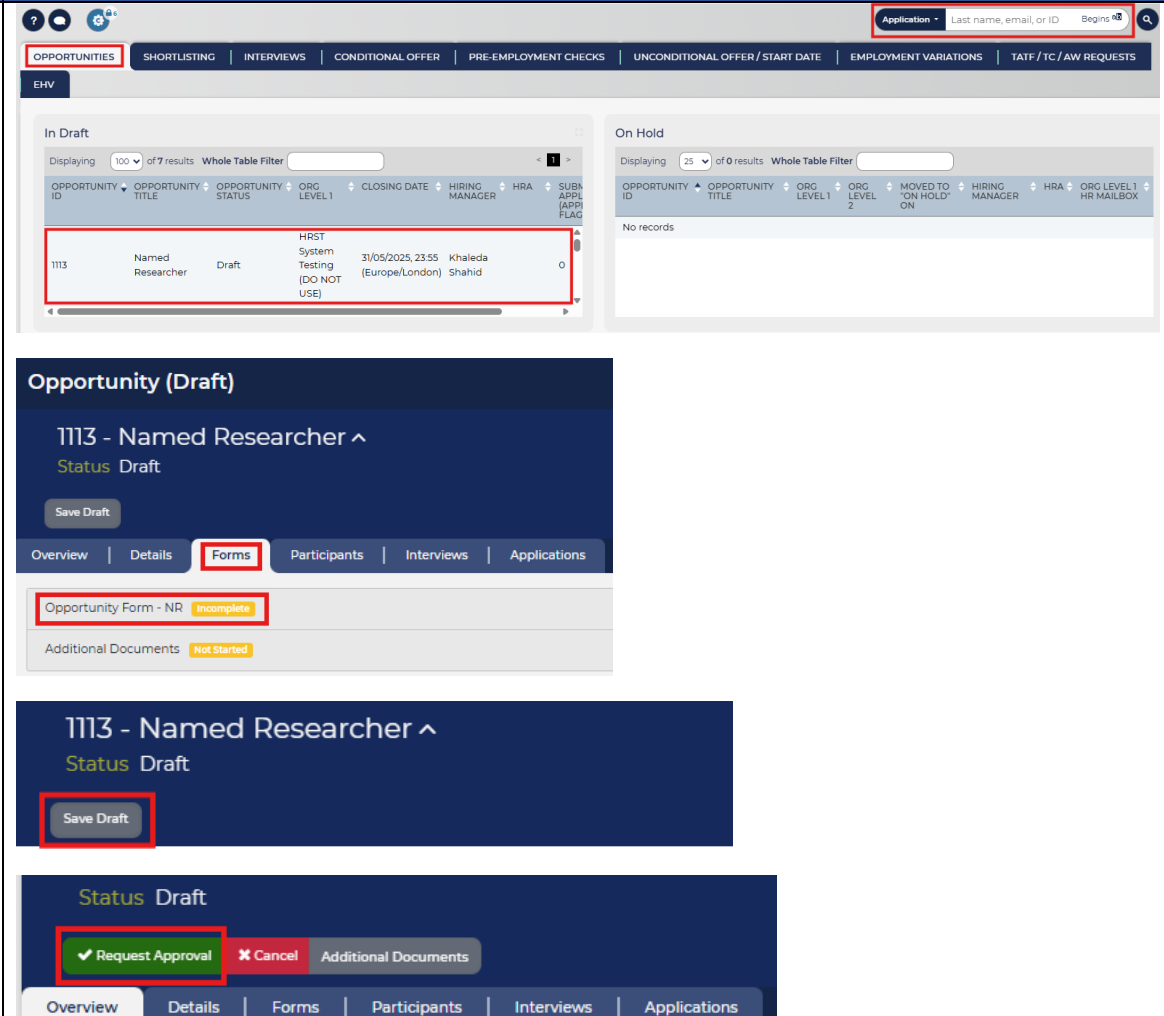
Step/Action	Examples/Screenshots
You can attach up to 10 additional documents to a candidate's Application page. 1) On the Application page, select the "Forms" tab, "Flags Form" which will open the Flags Form. 2) On the Flags Form, upload your documents and then click "Submit" at the bottom of the form 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.	 The first screenshot shows the 'Application Summary' for Jane Smith. The 'Forms (0)' tab is highlighted. The second screenshot shows the 'Flags Form' with a table for 'Additional Documents' (1-10) and a 'Submit' button at the bottom.

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

Step/Action

- 1) Locate your draft Opportunity. To do so, you can either:
 - i. Use your **Dashboard** by scrolling down on 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 top right of your dashboard using the Opportunity Title or ID ensuring the search parameter is set to Opportunity.
- 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 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.

Example/Screenshot



The screenshot displays the HR system interface. At the top, there is a search bar with the text 'Application' and a search icon. Below the search bar, there are several tabs: 'OPPORTUNITIES', 'SHORTLISTING', 'INTERVIEWS', 'CONDITIONAL OFFER', 'PRE-EMPLOYMENT CHECKS', 'UNCONDITIONAL OFFER / START DATE', 'EMPLOYMENT VARIATIONS', and 'TATF / TC / AW REQUESTS'. The 'OPPORTUNITIES' tab is selected.

Under the 'OPPORTUNITIES' tab, there are two sections: 'In Draft' and 'On Hold'. The 'In Draft' section shows a table with the following data:

OPPORTUNITY ID	OPPORTUNITY TITLE	OPPORTUNITY STATUS	ORG LEVEL 1	CLOSING DATE	HIRING MANAGER	HRA	SUBN APPL (APPL FLAG)
1113	Named Researcher	Draft	HRST System Testing (DO NOT USE)	31/05/2025, 23:55	Khaleda Shahid		0

The 'On Hold' section shows a table with the following data:

OPPORTUNITY ID	OPPORTUNITY TITLE	ORG LEVEL 1	ORG LEVEL 2	MOVED TO 'ON HOLD' ON	HIRING MANAGER	HRA	ORG LEVEL 1 HR MAILBOX
No records							

Below the tables, there is a section titled 'Opportunity (Draft)' for the '1113 - Named Researcher'. The status is 'Draft'. There is a 'Save Draft' button. Below this, there are tabs: 'Overview', 'Details', 'Forms', 'Participants', 'Interviews', and 'Applications'. The 'Forms' tab is selected.

Under the 'Forms' tab, there is a section titled 'Opportunity Form - NR' with a status of 'Incomplete'. Below this, there is a section titled 'Additional Documents' with a status of 'Not Started'.

Below the 'Forms' section, there is a section titled '1113 - Named Researcher' with a status of 'Draft'. There is a 'Save Draft' button.

Below the 'Save Draft' button, there is a section titled 'Status Draft' with a green 'Request Approval' button, a red 'Cancel' button, and an 'Additional Documents' button.

At the bottom, there are tabs: 'Overview', 'Details', 'Forms', 'Participants', 'Interviews', and 'Applications'. The 'Forms' tab is selected.

Giving access to others	
Step/Action	Example/Screenshot
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 IT Service Desk to request it.	