

Named Researcher Recruitment Request - Hiring Manager User Guide

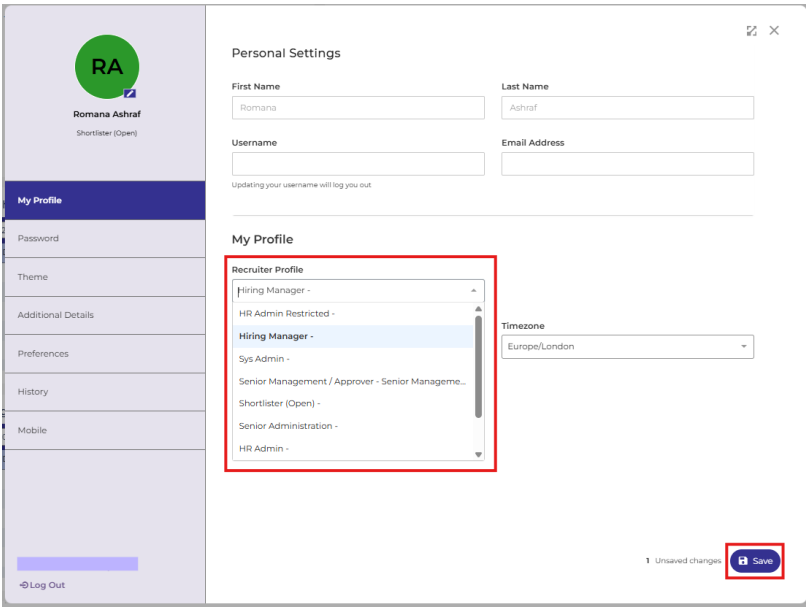
This document will provide you with step-by-step guidance on how to:

- [Create a Named Researcher Opportunity/Vacancy including copying Vacancies](#)
- [Reviewing a Vacancy saved as “Draft” and releasing for approval](#)
- [Create an offer for a Named Researcher](#) and [attaching 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: 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. The Opportunity will be returned to the Hiring Manager if it is incorrectly categorised as a Named Researcher.

Where a post is not being advertised for any other reason (outside of the Named Researcher route), please raise a Standard Recruitment request.

Step/Action	Example/Screenshot
<p>To access Oleo, use this link: https://qmul-jobs.tal.net/ and click on “Log in with single sign on” to log into the system.</p> <p>Note: You must be logged in with a “Hiring Manager” or a “Faculty Hub” profile to be able to create an Opportunity.</p> <p>When you log into Oleo, you will be presented with your homepage known as your Dashboard.</p> <p>To switch your profile:</p> <ol style="list-style-type: none"> 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”. <p>The profile will now switch and load the relevant dashboard.</p>	

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.

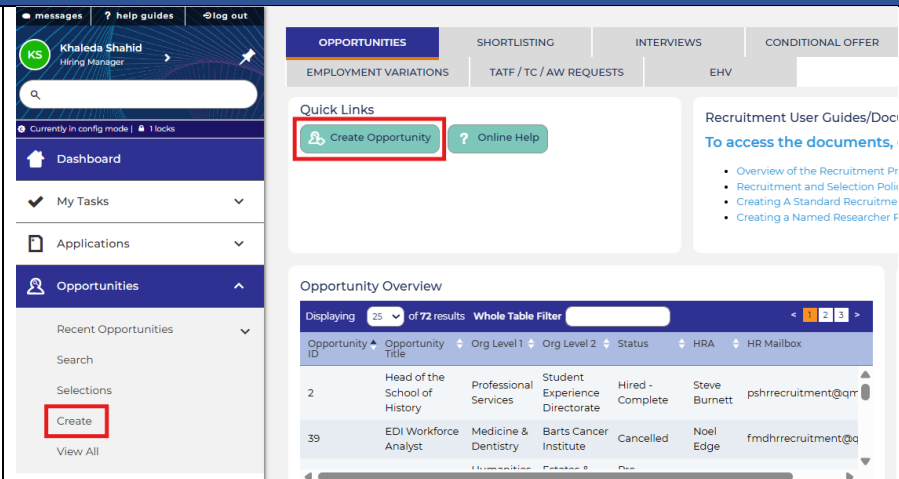
Quick Tip: If you are on a screen other than the **“Opportunities”** tab on your dashboard, enter the word **“create”** in the search box in the left-hand menu and then click on the result that appears. This will launch the Opportunity request Form for you to complete.

- 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.

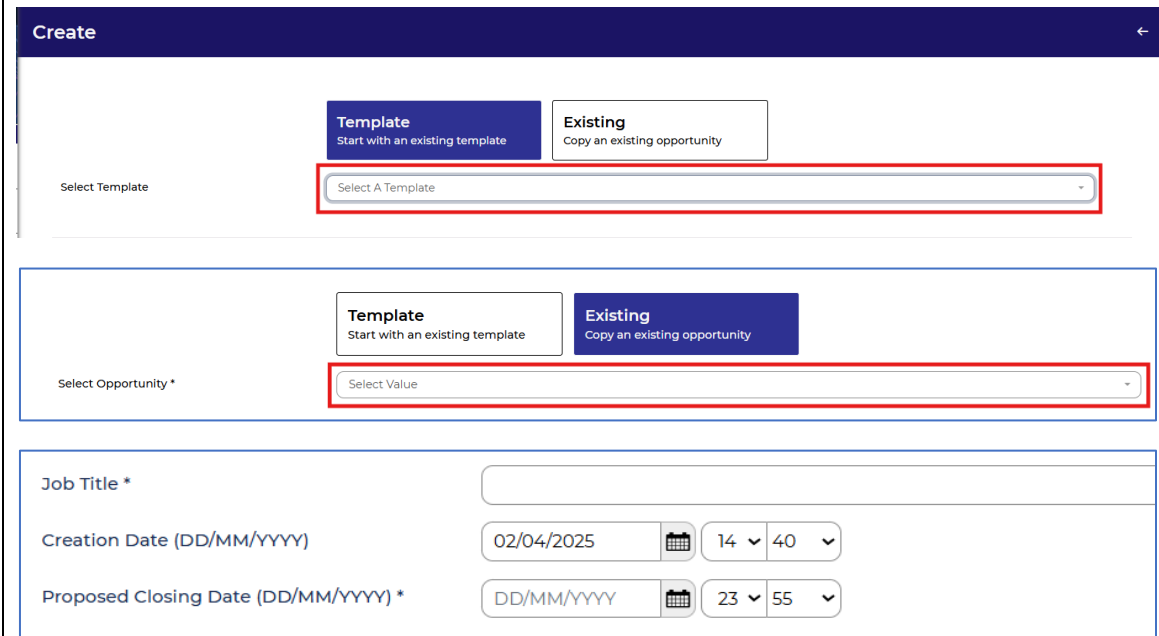
If you select the **“Template”** tile, you will need to select the **Named Researcher** template.

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”** which must be 3 months after the creation date. **“Creation Date”** is auto populated and should be left as is.



The screenshot shows the recruitment system dashboard. On the left, the 'Opportunities' menu is expanded, and the 'Create' option is highlighted with a red box. In the main content area, the 'Quick Links' section also has the 'Create Opportunity' button highlighted with a red box. Below this, there is an 'Opportunity Overview' table with columns for Opportunity ID, Title, Org Level 1, Org Level 2, Status, HRA, and HR Mailbox. Two rows are visible: one for 'Head of the School of History' (Professional Services, Student Experience Directorate, Hired - Complete) and one for 'EDI Workforce Analyst' (Medicine & Dentistry, Barts Cancer Institute, Cancelled).



The screenshot shows the 'Create' form. At the top, there are two tiles: 'Template' (Start with an existing template) and 'Existing' (Copy an existing opportunity). Below these, there are two dropdown menus: 'Select Template' and 'Select Opportunity *'. Both dropdown menus are highlighted with red boxes. Below the dropdowns, there are three input fields: 'Job Title *', 'Creation Date (DD/MM/YYYY)' (pre-filled with 02/04/2025), and 'Proposed Closing Date (DD/MM/YYYY) *' (pre-filled with DD/MM/YYYY). The 'Creation Date' and 'Proposed Closing Date' fields have calendar icons and dropdown menus for day and month selection.

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;
 - the individual's name (FIRST NAME, SURNAME), typically captured within the Staff and Investigator DI costs section of the grant award letter or;
 - a confirmation letter from the Grant Award Body detailing the named researcher status of the individual against the specific award.
- **Supplementary Material:** You can attach supplementary material here. Documents must be uploaded in PDF format.

Position Details

Budget Code *	<input type="text"/>
Organisation Level 1 *	<input type="text" value="Select"/>
Organisation Level 2 *	<input type="text" value="Select"/>
Organisation Level 3 *	<input type="text" value="Select"/>
Career Family *	<input type="text" value="Select"/>
Planned Number of Hires (FTE) *	<input type="text"/>

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 *	<input type="text" value="Select"/>
Will this position be term time only? *	<input type="text" value="Select"/>
Target Start Date *	<input type="text" value="DD/MM/YYYY"/>
Reason for Recruitment Request *	<input type="text" value="Select"/>

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 *

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 *	<input type="text" value="x Research Grant"/>
Funding End Date *	<input type="text" value="DD/MM/YYYY"/>

Job Pack & Attachments

Job Pack Attachment (Internal) *	<input type="text" value="Choose file"/> <input type="text" value="No file chosen"/>
Evidence of Grant Agreement *	<input type="text" value="Choose file"/> <input type="text" value="No file chosen"/>
Supplementary Material 1	<input type="text" value="Choose file"/> <input type="text" value="No file chosen"/>
Supplementary Material 2	<input type="text" value="Choose file"/> <input type="text" value="No file chosen"/>
Supplementary Material 3	<input type="text" value="Choose file"/> <input type="text" value="No file chosen"/>

- 6) Complete the **Pre-employment Checks** section. This section will determine the workflow for the successful candidate’s 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 all automated notifications for this vacancy.

- 9) Once you are happy with the details on the 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) 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.

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 *

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? *

Essential Qualifications Required? *

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 *

Key Leads

Hiring Manager *

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 for a Named Researcher. The title is "1112 - Named Researcher ^" with a status of "Draft". There are three main buttons: "Request Approval" (green with a checkmark), "Cancel" (red with an X), and "Additional Documents" (grey). Below these are navigation tabs: "Overview", "Details", "Forms" (highlighted with a red box), "Participants", "Interviews", and "Applications". Under the "Forms" tab, there is a table with two rows: "Opportunity Form - NR" with a "Completed" status (green box) and "Additional Documents" with a "Not Started" status (yellow box). Both the "Forms" tab and the "Opportunity Form - NR" row are highlighted with red boxes.

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 Faculty Director of Operations (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 guidance on the next page for creating an offer.

How to create an offer

Step/Action

- 1) Access the Application page by either:
 - i. Clicking on the “Oleeo” link in the email notification you received to take you directly to the Application.
 - OR**
 - ii. Search in the left-hand side menu entering the Application Name or ID and click on the Application in the results returned. **OR**
 - iii. 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.

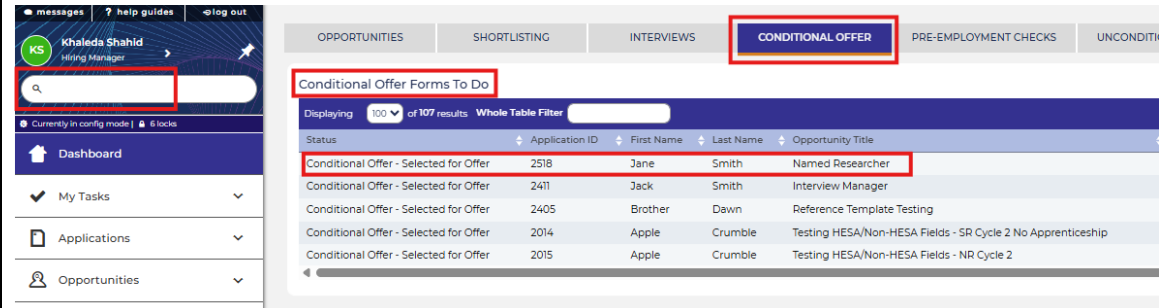
Note: You will need to complete the conditional offer form in one sitting. There is no option to save the form and come back to it later.

- 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 pre-populate according to the original request. **It is important you double-check that these details are correct.**

- 4) After completing the form, click “**Submit**”.

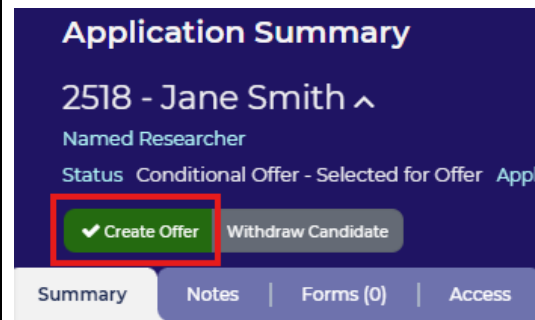
Upon submission of the form, the Application status will change to “**Conditional Offer - HR Admin Review**”.

Examples/Screenshots

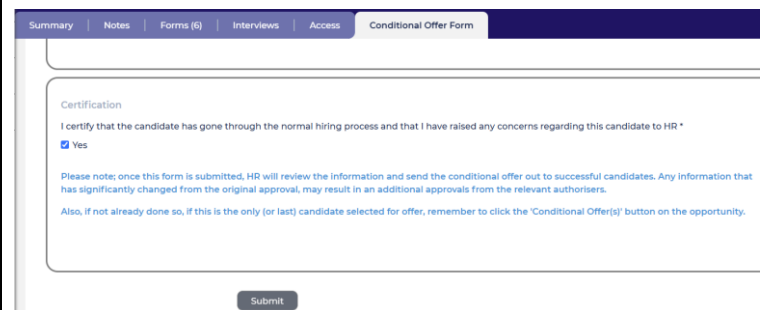


The screenshot shows a dashboard with a navigation menu on the left and a main content area. The main content area has tabs for 'OPPORTUNITIES', 'SHORTLISTING', 'INTERVIEWS', 'CONDITIONAL OFFER', 'PRE-EMPLOYMENT CHECKS', and 'UNCONDITIONAL OFFERS'. The 'CONDITIONAL OFFER' tab is active, showing a table titled 'Conditional Offer Forms To Do'. The table has columns for Status, Application ID, First Name, Last Name, and Opportunity Title. The first row is highlighted in red and contains the following data:

Status	Application ID	First Name	Last Name	Opportunity Title
Conditional Offer - Selected for Offer	2518	Jane	Smith	Named Researcher
Conditional Offer - Selected for Offer	2411	Jack	Smith	Interview Manager
Conditional Offer - Selected for Offer	2405	Brother	Dawn	Reference Template Testing
Conditional Offer - Selected for Offer	2014	Apple	Crumble	Testing HESA/Non-HESA Fields - SR Cycle 2 No Apprenticeship
Conditional Offer - Selected for Offer	2015	Apple	Crumble	Testing HESA/Non-HESA Fields - NR Cycle 2



The screenshot shows the 'Application Summary' page for application 2518 - Jane Smith. The status is 'Conditional Offer - Selected for Offer'. There are two buttons: a green 'Create Offer' button and a grey 'Withdraw Candidate' button. The 'Create Offer' button is highlighted with a red box.



The screenshot shows the 'Conditional Offer Form' page. It includes a 'Certification' section with a checkbox for 'Yes' and a 'Submit' button at the bottom.

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. The offer details are based on what has been entered on the Conditional Offer Form.

Note: If the offer differs from the original Opportunity request, 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.

Changes to any of the below parameters, will trigger an approval process:

- Organisation Level 1
- Grade/Pay Group
- An increase in FTE
- An increase in working hours

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

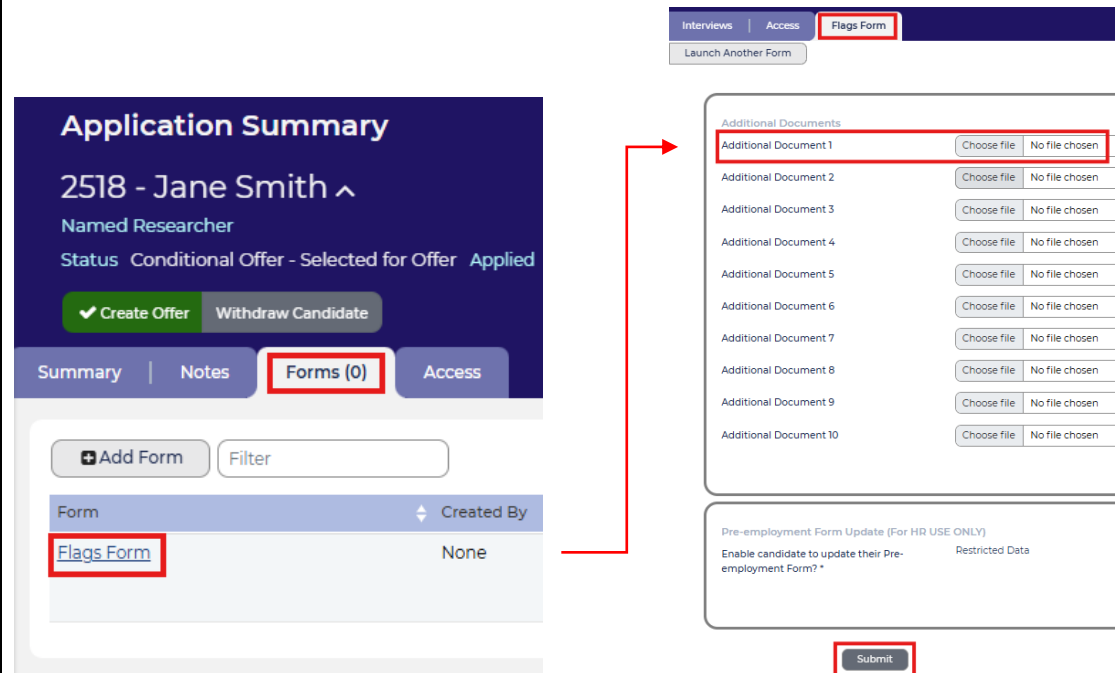
How to attach documents to an Applicant's page

Step/Action

You can attach up to 10 additional documents to a candidate's Application page.

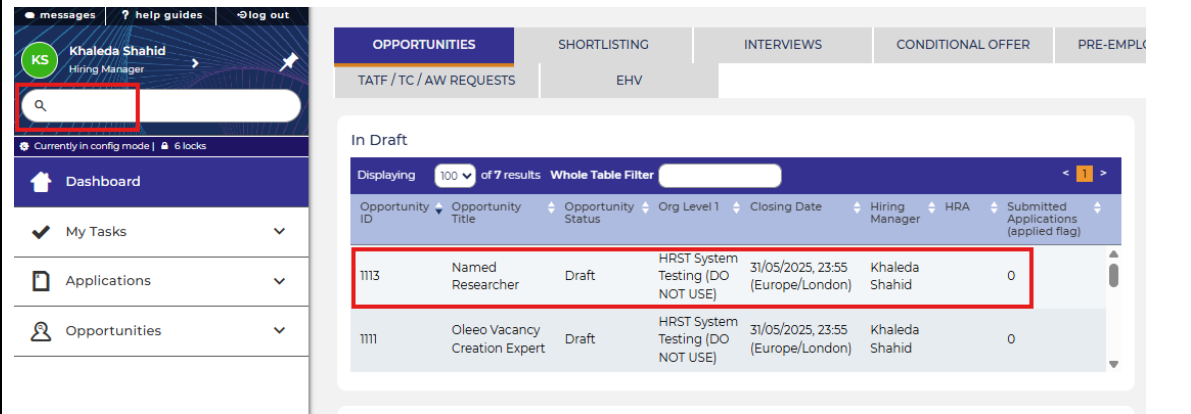

- 1) On the Application page, select the **"Forms"** tab, **"Flags Form"** which will open the Flags Form.
- 2) On the Flags Form, upload your documents and then click **"Submit"** at the bottom of the form to save the changes.
- 3) Remember to add a note under the **"Notes"** tab so that the Recruitment Team are aware of any additional documents that you may have uploaded.

Examples/Screenshots



The screenshots illustrate the process of attaching documents to an applicant's page. The left screenshot shows the 'Application Summary' for Jane Smith, with the 'Forms (0)' tab selected. The 'Flags Form' is highlighted in the list of forms. The right screenshot shows the 'Flags Form' interface, where up to 10 additional documents can be uploaded. A 'Submit' button is visible at the bottom.

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

Step/Action	Example/Screenshot																								
<p>1) Locate your draft Opportunity by either:</p> <ol style="list-style-type: none"> Scrolling down on your dashboard in the “Opportunities” tab to the “In Draft” widget and double click on the draft Opportunity you wish to review and edit. OR Search in the left-hand menu entering the Opportunity Title or ID and then click on the Opportunity in the results returned. <p>Quick pro tip: If you know the Opportunity ID, you can navigate straight to the Opportunity using the prefix “v:” followed by the ID. For example, if the Opportunity ID is “1113” enter “v:1113” and press enter.</p>	 <table border="1"> <thead> <tr> <th>Opportunity ID</th> <th>Opportunity Title</th> <th>Opportunity Status</th> <th>Org Level 1</th> <th>Closing Date</th> <th>Hiring Manager</th> <th>HRA</th> <th>Submitted Applications (applied flag)</th> </tr> </thead> <tbody> <tr> <td>1113</td> <td>Named Researcher</td> <td>Draft</td> <td>HRST System Testing (DO NOT USE)</td> <td>31/05/2025, 23:55 (Europe/London)</td> <td>Khaleda Shahid</td> <td></td> <td>0</td> </tr> <tr> <td>1111</td> <td>Oleoo Vacancy Creation Expert</td> <td>Draft</td> <td>HRST System Testing (DO NOT USE)</td> <td>31/05/2025, 23:55 (Europe/London)</td> <td>Khaleda Shahid</td> <td></td> <td>0</td> </tr> </tbody> </table>	Opportunity ID	Opportunity Title	Opportunity Status	Org Level 1	Closing Date	Hiring Manager	HRA	Submitted Applications (applied flag)	1113	Named Researcher	Draft	HRST System Testing (DO NOT USE)	31/05/2025, 23:55 (Europe/London)	Khaleda Shahid		0	1111	Oleoo Vacancy Creation Expert	Draft	HRST System Testing (DO NOT USE)	31/05/2025, 23:55 (Europe/London)	Khaleda Shahid		0
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<ol style="list-style-type: none"> Once you have landed on the Opportunity page, select the “Forms” tab and click on the first row. Review the form and make the necessary changes. Ensure you click “Submit” at the bottom of the form to save the changes. 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 see the “Request Approval” button. 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. 	 <p>Opportunity (Draft) 1113 - Named Researcher ^ Status Draft</p> <p>Save Draft</p> <p>Overview Details Forms Participants Interviews Applications</p> <p>Opportunity Form - NR Incomplete</p> <p>Additional Documents Not Started</p> <p>Status Draft</p> <p>Request Approval Cancel Additional Documents</p>																								

Giving access to others

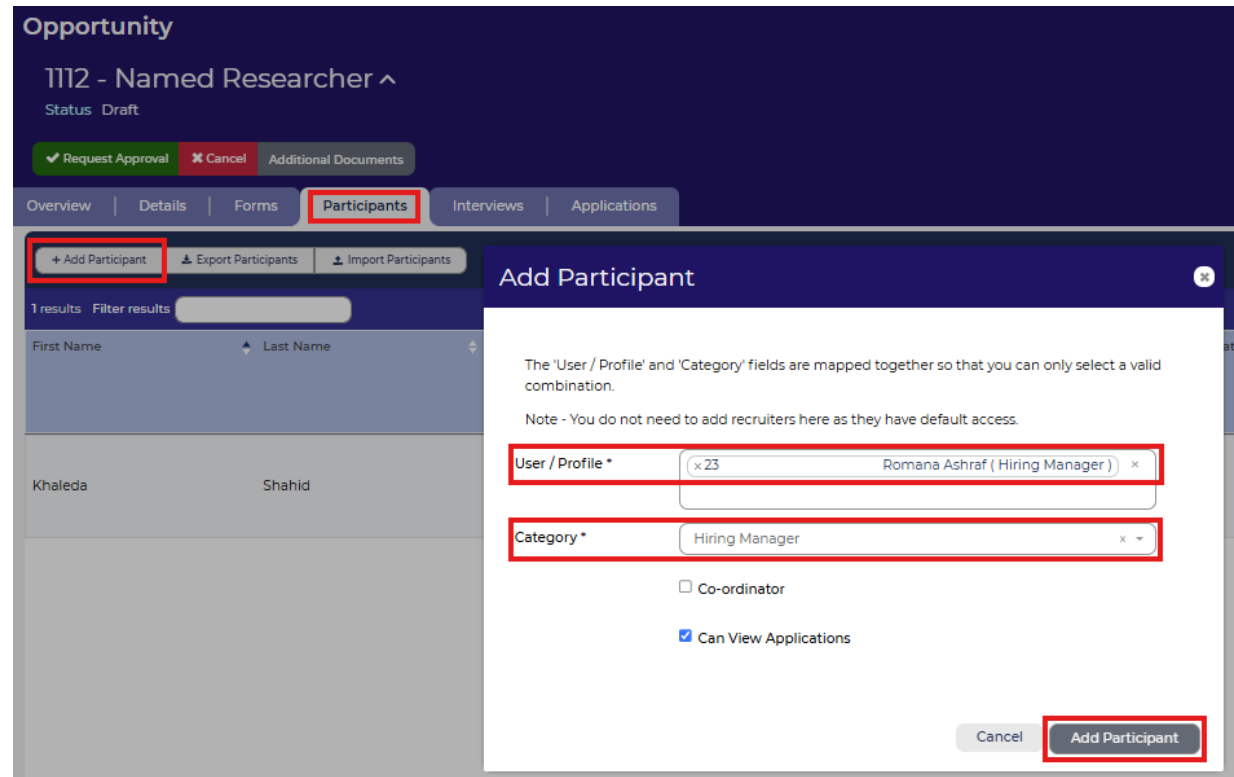
Step/Action

To give others the same access as a Hiring Manager 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.

Example/Screenshot



The screenshot shows the 'Opportunity' page for '1112 - Named Researcher ^' with a status of 'Draft'. The 'Participants' tab is active. The 'Add Participant' button is highlighted. The 'Add Participant' modal is open, showing the following fields:

- User / Profile ***: Romana Ashraf (Hiring Manager)
- Category ***: Hiring Manager
- Co-ordinator
- Can View Applications

The 'Add Participant' button at the bottom right of the modal is highlighted.