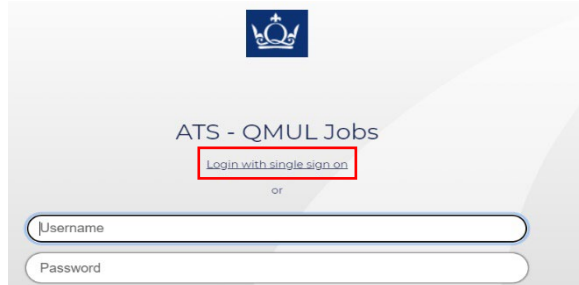


## Raising and Managing a Contract Variation Request - Oleeo User Guide

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.

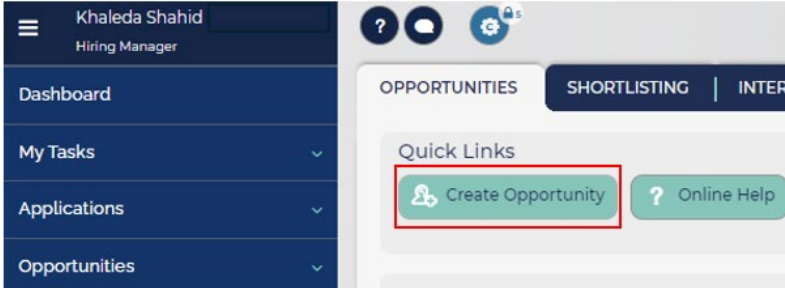
Accessing Oleeo	
Step/Action	Example/Screenshot
<p>To access Oleeo, use this link: <a href="https://qmul-jobs.tal.net/">https://qmul-jobs.tal.net/</a> and click on “Log in with single sign on” to log into the system. (You are not required to enter any login details).</p> <p><b>Note:</b> You must use the “<b>Hiring Manager</b>” profile to raise a Contract Variation Request.</p> <p>When you log into Oleeo, you will be presented with your homepage known as your <b>Dashboard</b>.</p>	
Raising a Contract Variation Request	
<p>You can raise a contract variation request (CVR) for the following scenarios:</p> <ul style="list-style-type: none"> <li>• Acting Up</li> <li>• Additional Responsibility</li> <li>• Additional Contract (6 months or less)</li> <li>• Change of Hours</li> <li>• Extension of Fixed term/Temporary Contract</li> <li>• Fixed term/Temporary to Permanent Contract</li> <li>• Job Regrade / Promotion / Transfer / Demotion</li> <li>• Royalty Payments</li> <li>• Secondment</li> </ul>	

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

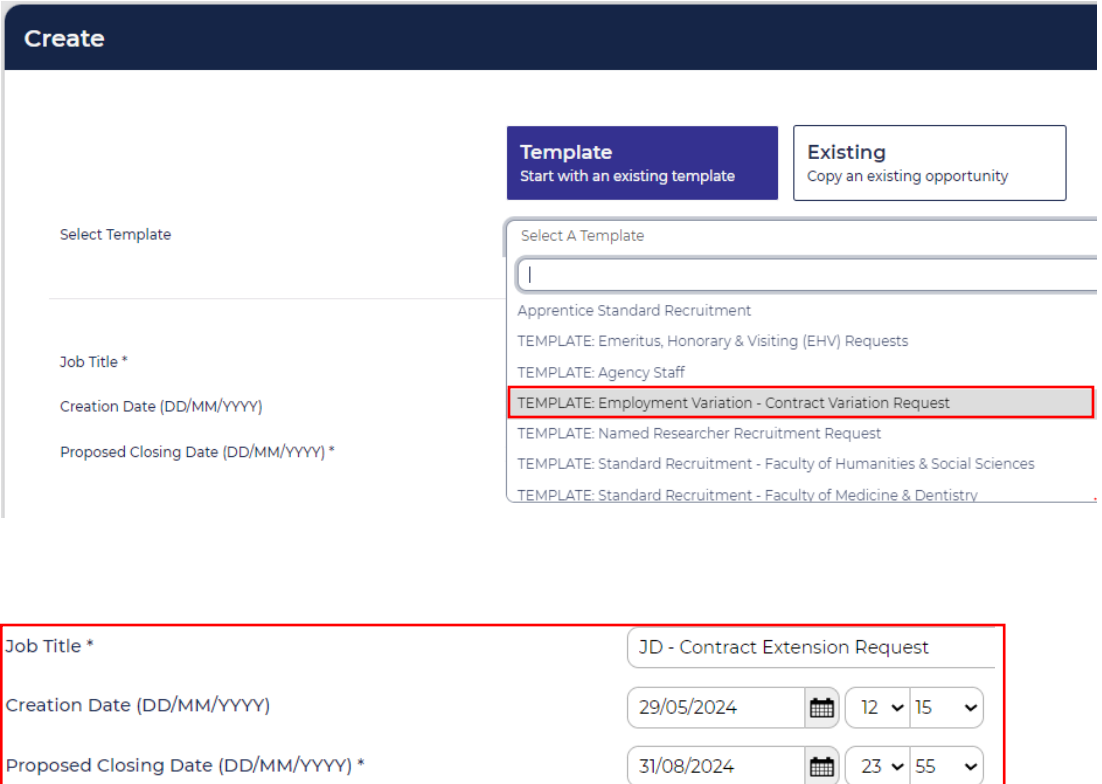
2) Select the “**Employment Variation - Contract Variation Request**” template from the drop-down menu.

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.
- **Proposed Closing Date:** Input a date at least 3 months in the future.



The screenshot shows the Hiring Manager profile for Khaleda Shahid. The left sidebar contains links to Dashboard, My Tasks, Applications, and Opportunities. The main area has tabs for OPPORTUNITIES, SHORTLISTING, and INTERVIEW. Under the OPPORTUNITIES tab, there is a 'Quick Links' section with a 'Create Opportunity' button (highlighted with a red box) and an 'Online Help' button.



The screenshot shows the 'Create' form. At the top, there are two tabs: 'Template' (selected) and 'Existing'. The 'Template' tab has a sub-header 'Start with an existing template'. Below this is a 'Select Template' dropdown menu. The dropdown is open, showing a list of templates. The template 'TEMPLATE: Employment Variation - Contract Variation Request' is highlighted with a red box. Below the dropdown, there are input fields for 'Job Title \*', 'Creation Date (DD/MM/YYYY)', and 'Proposed Closing Date (DD/MM/YYYY) \*'. The 'Job Title' field contains 'JD - Contract Extension Request'. The 'Creation Date' field contains '29/05/2024'. The 'Proposed Closing Date' field contains '31/08/2024'. The entire form area is enclosed in a red box.

- **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 \*

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

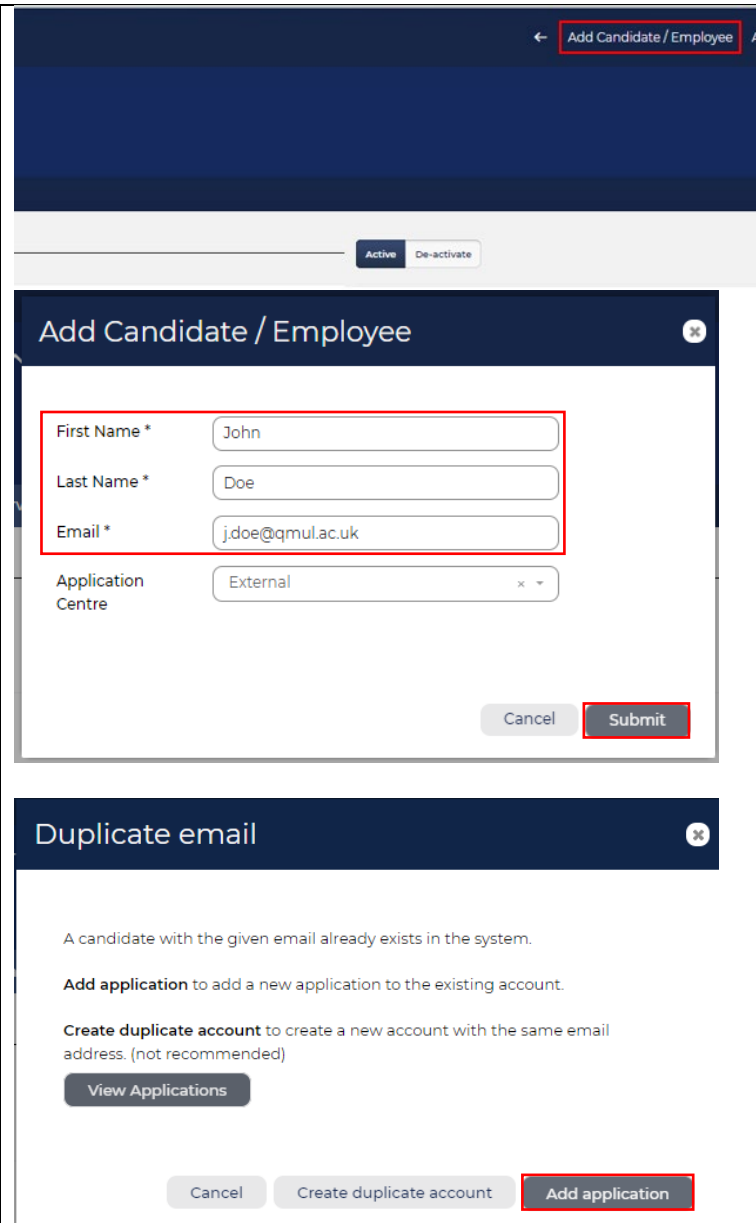
### Summary

Current Status: Active

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

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

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



The screenshot shows a web interface for adding a candidate or employee. At the top right, a button labeled "Add Candidate / Employee" is highlighted with a red box. Below this, there are "Active" and "De-activate" buttons. The main form is titled "Add Candidate / Employee" and contains the following fields:

- First Name \***: Input field with "John" entered.
- Last Name \***: Input field with "Doe" entered.
- Email \***: Input field with "j.doe@qmul.ac.uk" entered.
- Application Centre**: Dropdown menu with "External" selected.

At the bottom of the form, there are "Cancel" and "Submit" buttons, with "Submit" highlighted by a red box. Below the form, a "Duplicate email" warning is displayed, stating: "A candidate with the given email already exists in the system." It offers two options: "Add application" to add a new application to the existing account, and "Create duplicate account" to create a new account with the same email address (not recommended). A "View Applications" button is also present. At the bottom of the warning, there are "Cancel", "Create duplicate account", and "Add application" buttons, with "Add application" highlighted by a red box.

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

- 9) Click “**Request Form**”, complete the form and “**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.

**Note:** **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.

**Note:** Once you have submitted the form, no edits can be made and will NOT show for the Approver.

- 10) Upon submission of the form, the application status will change to “**EV - Awaiting Tier 1 Approval**”.



**Application Summary**

2299 - John Doe ^

JD - Contract Extension Request

Status Manually Added, Application Not Complete

✓ Request Form

Summary | Notes | Forms (0) | Access

Application Summary



**Application Summary**

2299 - John Doe ^

JD - Contract Extension Request

Status EV - Awaiting Tier 1 Approval

Summary | Notes | Forms (0) | Access

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 on 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

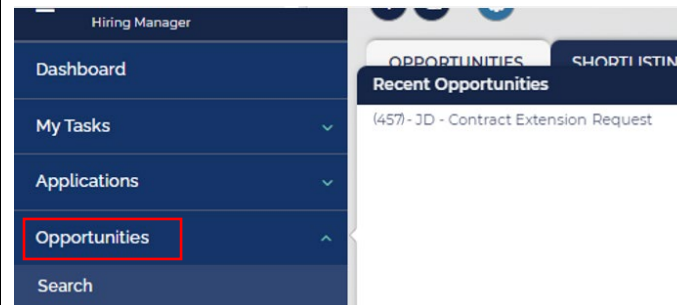
Overview | Details | Forms | Participants | Interviews | Applications

#### Summary

Current Status: Draft

Opportunity - title or ID

Begins at



### Opportunity (Draft)

457 - JD - Contract Extension Request ^

Status Draft

Save Draft

Overview | Details | Forms | Participants | Interviews | Applications

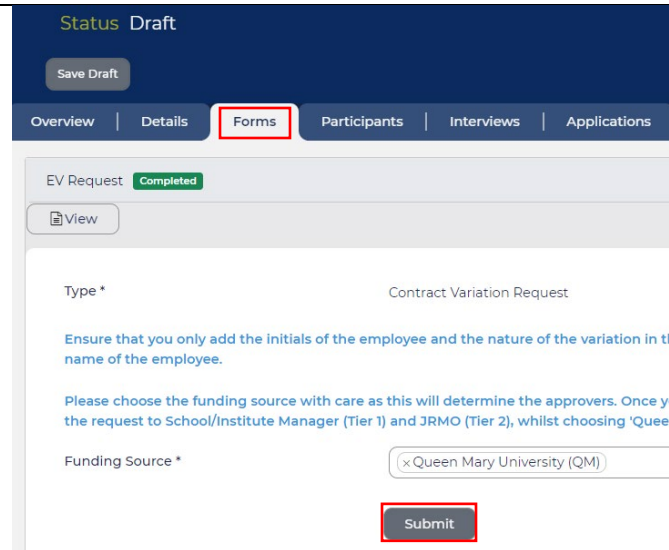
#### Summary

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.

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



Status Draft

Save Draft

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

EV Request **Completed**

View

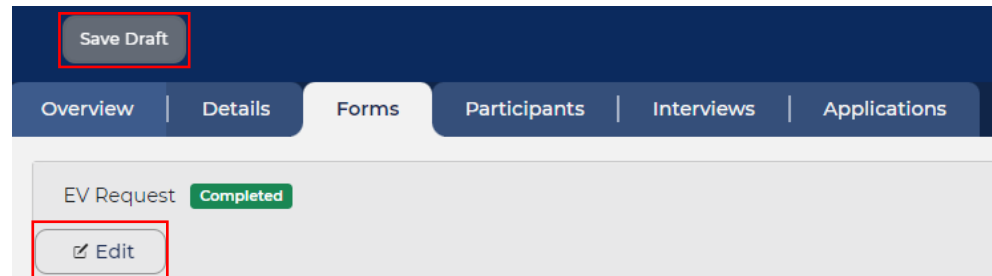
Type \* Contract Variation Request

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 JRM0 (Tier 2), whilst choosing 'Queen

Funding Source \*

**Submit**



**Save Draft**

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

EV Request **Completed**

**Edit**

## 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.

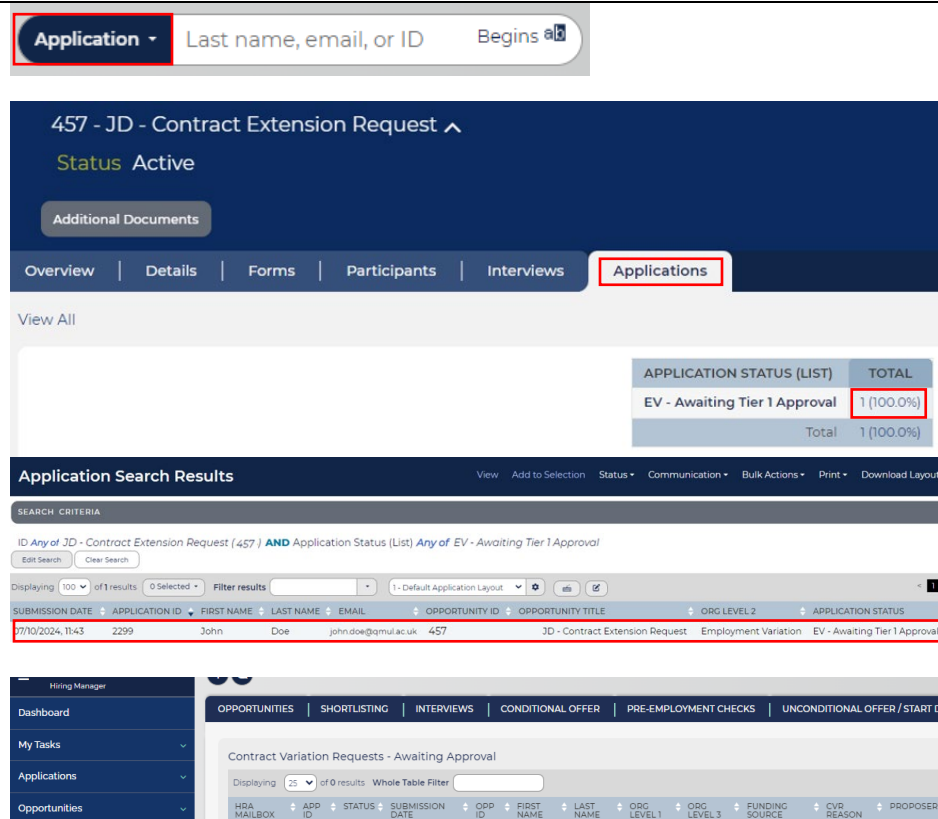
**Method 3:**

- 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.

- Double click on the CVR you wish to view.



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 displayed, showing a status of "Active". The "Applications" tab is selected, showing a table with one application: "EV - Awaiting Tier 1 Approval" with a total of 1 (100.0%).

Below the table, the "Application Search Results" section is shown. It includes a search criteria bar and a table of results. The table has columns for Submission Date, Application ID, First Name, Last Name, Email, Opportunity ID, Opportunity Title, Org Level 2, and Application Status. The first row is highlighted, showing a submission date of 27/10/2024, Application ID 2299, and a status of "EV - Awaiting Tier 1 Approval".

At the bottom, the "Employment Variations" tab is selected, showing a table of "Contract Variation Requests - Awaiting Approval". The table has columns for HDA Mailbox, App ID, Status, Submission Date, Org ID, First Name, Last Name, Org Level 1, Org Level 3, Funding Source, CVR Reason, Proposer, Proposed Date of Change, and Tier 1 Approver.

## 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**”.

### Application Summary

2299 - John Doe ^

JD - Contract Extension Request

Status EV - Not Approved Applied 7 October 2024 at 11:43:09 BST

✓ Update

Summary

Notes

Forms (3)

Access

CVR Form

## Deleting a request created in error

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